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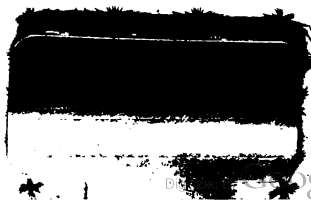
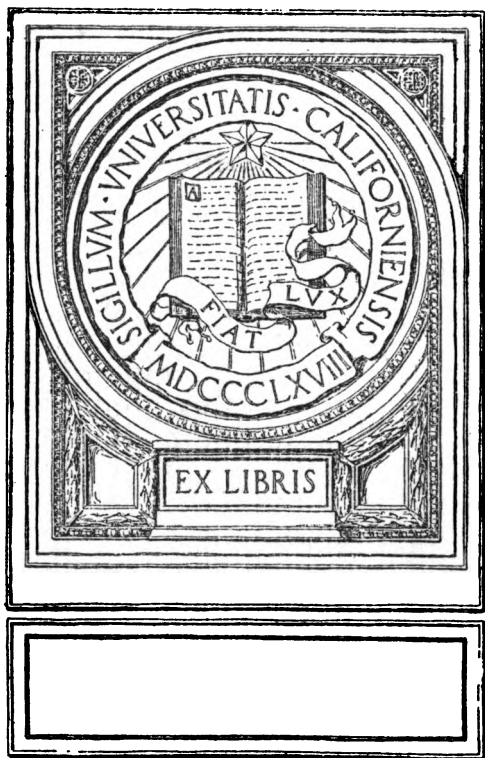
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**THE
PRIVATE SECRETARY.
HIS DUTIES AND
OPPORTUNITIES**

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CALIFORNIA**

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TO VIVID
ALLEGORIA

PREFACE

This book is the outgrowth of a series of lectures on private secretarial duties delivered by the author at New York University, School of Commerce, Accounts and Finance. The lectures were given to meet a demand from private secretaries and from prospective private secretaries, who desired to learn just what the duties of the private secretary were, how best to perform these duties, and also how to fit themselves fully for the position.

The purpose of this book, then, is to give to those persons who are seeking to prepare themselves to become private secretaries or assistants to employers in the business or professional field the information that they will need to have about their specific duties. In addition it seeks to aid prospective private secretaries by pointing out briefly the general knowledge and qualities that they should possess.

To Edward P. Currier, Secretary to Frank A. Vanderlip (the President of the National City Bank); to William B. Tyler, Financial Secretary to Cornelius Vanderbilt of New York City; and especially to John Burke, Secretary to Michael Friedsam (President of B. Altman Company of New

PREFACE

York), the author acknowledges a debt for information given.

The illustrations used in the chapter on filing are shown through the courtesy of the Library Bureau.

Professor George Burton Hotchkiss, head of the Business English Department of New York University, School of Commerce, Accounts and Finance has contributed much to the making of this book by his advice and criticism.

EDWARD J. KILDUFF.

New York University,

June 1, 1916.

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INTRODUCTION TO PRIVATE SECRETARIAL WORK

Various classes of secretaries

The word *secretary* has its origin in common with the word *secret*, for both are derived from the Latin *secretus* which means private, secret, pertaining to private or secret matters. Hence came the definition of secretary as one who is intrusted with private or secret matters; a confidential officer or attendant; a confidant. A secondary definition of the word secretary is the following: a person who conducts correspondence, takes minutes, and so forth, for another or others; as for an individual, a corporation, a society, or a committee; and who is charged with the general conduct of the business arising out of or requiring such correspondence, the making of such records, and so forth.

The definitions of secretary given above are general and are intended to cover all classes of secretaries. More exact definitions are needed, however, for secretaries are usually of a specific kind. It may be said that there are five main classifications of those who bear the title of secretary:

(1) the political public-office holding secretary; (2) the secretary of the public or semi-public organization; (3) the corporation secretary and the "company secretary"; (4) the social secretary; and (5) the private secretary.

The political public-office holding secretary is one who has been appointed or elected to a political office where he performs the duties that go with the office. The Secretary of the Navy in the United States, for example, has charge of naval affairs and acts as adviser to the President on such matters. As a secretary of this type has more or less full executive powers in his particular field, he can be called a true executive.

The second classification of secretaries includes those who are secretaries to educational institutions, charitable organizations, chambers of commerce, merchants' associations, and so on. Such secretaries, so-called, possess a specialized knowledge of their particular fields and are usually in direct charge of the workings of their organizations. Although these secretaries are under the nominal supervision of the executive committee or the executive head, yet they themselves are real executives.

In the third classification of those who bear the title of secretary are those called corporation secretaries and "company secretaries." The secretary to a corporation in the United States is usually one

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of the elected or appointed officers of the organization. He is commonly secretary in name only, as subordinates usually perform whatever duties of secretarial nature are attached to the office. Some of these duties are: the keeping of minutes, the notification of stockholders of meetings, the care of the various documents, and so forth. In England there is a special type of secretary known specifically by the name of "Company Secretary." Ordinarily such a "Company Secretary" has received training in performing the duties which devolve upon the secretary of a company or corporation, and is hired for the purpose of attending to those duties. Seldom or never in England is the position of the "Company Secretary" nominal, as it so often is in the United States.

Social secretaries are included in the fourth classification. A social secretary is one who performs for an individual certain duties connected with that individual's social intercourse. Some of the duties of such a secretary are the handling of social correspondence, the planning of entertainments, the keeping of household accounts, the acting as adviser, confidant, and living Who's Who.

A line cannot be sharply drawn in definitions between the social secretary and the private secretary, for these terms are often applied to the same person and the duties of each are in many cases iden-

tical. However, as it is not the purpose of this book to deal with the duties of the social secretary insofar as social duties are concerned, the social secretary will be considered as a special type not included under the title of private secretary.

The private secretary defined

In all probability the private secretary of the fifth classification was the forerunner in the matter of time of the other four types of secretaries mentioned above. The Roman Emperor Aurelian (272-275) had his secretaries. In some cases these men were not true private secretaries, but were more like the present-day stenographers. In the majority of instances, however, they were more than mere clerks, for they were in charge of the correspondence of the Emperor and also performed other duties that the modern private secretary performs. The writing of letters was, nevertheless, the chief function of these secretaries.

Within the confines of this book the private secretary (sometimes called the "assistant," as, "the Assistant to the President") will be considered as one who performs for an individual certain duties connected with that individual's personal, business, or professional affairs. These duties will vary according to the personal, business, or professional

There is a constantly increasing demand from business men for private secretaries. Not many years ago the business man or, for that matter, any man in the United States who had a private secretary, was a rarity. Private secretaries were thought to be all right for England and the Continent, but it was not considered in accord with our democratic tendencies to have one man submerge his individuality to one better off financially. The duties of society in the United States did not demand the private secretary. Business was not yet complex enough to force many business men to have some one act as their other self. As time went on business became more complex and intensive. The demands on the big executive became so great that he had to find more time. This is just the want that the private secretary meets, for he takes so many details from the shoulders of the employer that the latter can devote more time to his important executive work.

Opportunities for stenographers

Many private secretaries to big men have begun their careers as stenographers. Gradually they have taken upon themselves various little responsibilities; gradually they have acquired a knowledge of the workings of the office and of the wishes of their chiefs. Then slowly they themselves have

come to realize that they are no longer mere stenographers who take dictation and transcribe it on the typewriter. They are private secretaries, if not in name, then certainly in fact.

Stenography is a fertile field for the man who is ambitious, for this kind of work leads to great successes by a comparatively short road. Nearly every department in a modern business corporation, nearly every important man, has stenographers. In his daily work, therefore, the competent stenographer has the privilege of sitting at the elbow of educated and highly trained men who are holding responsible positions. This is a liberal education in itself, for by coming in daily contact with the forceful personalities of these men and by gradually absorbing from them the keen knowledge of business, the stenographer has a wonderful opportunity for bettering himself. The details of the work and methods of these important men daily pass through the brain and fingers of the stenographer in every letter that goes out from the office. Day by day the wide-awake stenographer is brought into closer touch with the business of his employer. He cannot but take in many valuable bits of information concerning his employer's business, his customs, policies, and transactions. Moreover, a great stimulus is at hand for the stenographer. This stimulus comes from the constant and personal

contact with the trained mind and strong intellect of his employer.

The direct line of advancement for the stenographer leads into the position of private secretary. This fact the stenographer ought to realize. After he has seen, then, that the next and logical step in his career is to become a private secretary, he should set about preparing himself for the place. He should be continually alive to his opportunities. He should be wide-awake. No matter if the one from whom the stenographer takes dictation is an unimportant officer in the company or is an unimportant man, yet, by making a good private secretary for him, the stenographer will make himself a good private secretary for the bigger man, who must in time notice the stenographer's competency in the smaller position. Good work, competency, and efficiency can never be hidden for long either in business or in any other place, because business men are constantly searching for just these qualities. Moreover, since the stenographer is so close to the one in charge of important affairs, he has many opportunities to display those qualities which lead to promotion and advancement.

The opportunities of the private secretary

At the present time the need of and the demand for secretaries to business men are continually

growing. It is in the business field that the private secretary of the near future will find his greatest opportunities for work and advancement. Many instances could be given which show that the able private secretary does not remain a private secretary for all time, but that he has unusual opportunities to advance into an executive position. For such a position he is well trained by experience because the nature of his employment as private secretary usually makes him the logical substitute when the executive cannot act personally.

The career of George Bruce Cortelyou, president of the Consolidated Gas Company of New York, is directly to the point. In November, 1895, he was appointed stenographer to the President of the United States. In May, 1900, he became the private secretary to President McKinley. Until 1903 he served President Roosevelt in the same capacity. At that time, he was appointed Secretary of Commerce and Labor. In March, 1905, he was made Postmaster-General, and on March 4, 1907, he became Secretary of the Treasury.

Secretary of War, Newton D. Baker, in the Cabinet of President Wilson, had already had cabinet experience, for he had acted as private secretary to Postmaster-General Wilson in 1896.

The private secretary has a great advantage from being in proximity to those at the top, for he may

learn a business thoroughly and directly without the delays and rebuffs that are unavoidable when one begins at the bottom. He is personally trained in the large problems of the business by the head of the business himself. Since he gains not only a basic, but also a specific knowledge of his employer's business, it is reasonable and likely that he should be placed in a good executive position when a man is demanded who is familiar with the intricacies of the business. The private secretary has the opportunity of impressing his employer with his good personal qualities — qualities which will make the employer value and esteem him.

The private secretary has also the opportunity of meeting the important persons who come to see his employer. Upon these he has the chance of making a favorable impression which will be of great advantage to him in the future. Moreover, the private secretary comes into such frequent and intimate contact with these callers that he is soon upon a friendly and personal footing with them. Hence the private secretary has the opportunity of making business friends and acquaintances of the highest type and of the most valuable kind — an opportunity which is not offered to the average man. Such acquaintances are of special help if the private secretary ever secures an executive position. Because of his friendship with men of

such a high type and because of their knowledge of his personality, character, and business worth, the private secretary is of great value to the firm which employs him for the executive position.

Knowledge that the private secretary should have

Although it is the duty of the private secretary to carry details and to see that they are properly presented when broad questions of policy are to be determined, nevertheless he is very often called upon to advise with his executive in large questions of policy. Since this is so, the private secretary, besides having a knowledge of the duties of a private secretary, should have a sound, broad knowledge of business in general and a specific knowledge of the particular business of the employer. With such knowledge he will be able to make his own decisions and will also be able to advise and help his employer. Accordingly, it is well that the private secretary should prepare himself as much as possible in the business of his employer. His line of advancement lies in the developing of his knowledge of the business of his employer.

A good education is an essential element. The employer and the persons met by the secretary in the performance of his duties are usually of such a class that any weakness in the education of the secretary is quickly perceived—to his disad-

vantage. Those, therefore, who have had the advantages of the higher forms of education usually make the best secretaries. A college training (the academic type will be found to be the most valuable) of some nature is desirable, for it will provide a general knowledge and also some culture. If the secretary has not received a college training, he should work to secure its equivalent by wide reading, personal study, and observation. The high-grade positions positively demand that the secretary shall have refinement and culture. To this training should be added a training in the specific work of the employer. An example of the type of education that will give a man the basic knowledge of so much value in the high-grade secretarial positions follows:

English

Economics

History (Ancient, European, and American)

Philosophy

Psychology

Mathematics

Geography

Two foreign languages (French and ^{Spanish}~~German~~, usually).

As soon as the secretary has secured his first position with a business or professional man, or has

changed his position from an employer in one branch of business to an employer in a different branch, he should begin to study and specialize on the subjects in direct relation to the business of that employer. Several examples of such groups of subjects are given below :

Secretary to a banker

Banking (in general)
Foreign Exchange
Investment and Speculation
Finance
Financial History
Accounting
Business Law
Real Estate
Money and Credit

Secretary to head of a manufacturing industry

Factory Management
Efficiency Engineering
Welfare Work
Business Law
Accounting
Finance
Selling
Advertising

Secretary to a life insurance official

Statistics
Security Investments
Principles of Insurance
Business Law

Money and Credit
Accounting
Finance
Banking

Stenography and typewriting

A knowledge of stenography and typewriting, it must be admitted, is not an essential requirement for the private secretary in the *higher type of position*. Few letters, if any, will be dictated word for word by the chief to the secretary, because the office stenographers will usually take such dictation. In the few cases, say of letters on very confidential or delicate matters, the private secretary might be asked to take down personally the chief's ideas. By using an abbreviated form of long hand

or by taking careful notes in long hand, the secretary can secure a nearly verbatim record. Despite the fact that a knowledge of stenography is not a prime requisite for the private secretary, such a knowledge is an asset. In many instances it will be of aid to the chief to have a word for word record of certain talks at a meeting, of a conversation over the telephone, and so forth. Moreover, a knowledge of stenography will aid the secretary himself, for stenography is a time saver and allows its user to make note of details in accurate form.

In the better positions, typists do the typing for the chief and also for the secretary. On certain occasions, however, a knowledge of typing will come in handy for the secretary. Certain confidential notes and short reports may have to be written. It may be considered safer by the secretary not to intrust the writing of such matters to any one but himself. To be sure, these matters can be written out in long hand, but a knowledge of typewriting is an asset that will frequently prove its worth. As a matter of fact, most secretaries have a knowledge of both stenography and typewriting.

The successful private secretary

There are too many ordinary private secretaries. Capable secretaries, however, are difficult to find. Unless a man intends to be a *first-class* secretary,

he should not go into the secretarial work, for the big rewards are only for the secretaries who are above the average.

A secretary who has a real intention of becoming a success must pull himself up above ordinary secretaries. Every little point that will aid him in helping his employer should be seized upon and put to work. These little efforts bring remarkable results and do much toward making the secretary efficient and successful. Nearly every one can easily and quickly learn the fundamentals and the big principles of secretarial work, but to this knowledge the good secretary ought to add those little refinements which will make his work better.

The real peril of the private secretary is that he is too often content to be of the average rather than of the best. It is not enough that he should be the same to-day as he was yesterday. It is not enough to be automatic — to be down at the office exactly at nine o'clock and to leave exactly at twelve; to be back promptly at one and to leave again at five o'clock. It is not enough that he should say, "I do everything I am told to do — what more can I do?" It is the little extra service rendered in business that tells with the employer. He will soon realize whether you are bettering your work with him and helping him more day by day or are standing still in the kind and amount of

service that you are rendering. The difference between the successful private secretary and the unsuccessful one is that the first makes the position greater than he found it; and the second keeps it where he found it and *it* keeps him there or drops him. The secretary must continually be on the search for ways and methods of aiding his employer; for the more he can help the employer, the more valuable he makes himself to the employer.



THE
PRIVATE SECRETARY
HIS DUTIES AND
OPPORTUNITIES

THE PRIVATE SECRETARY

HIS DUTIES AND OPPORTUNITIES

CHAPTER I

LEARNING THE POSITION

"THEN, I'll see you on the train about five o'clock." With these words John Forbes, president of the Forbes Steel Company, hung up the telephone receiver.

After a moment's thought, he pressed a button at the side of his desk. Then he sank back in his chair and musingly stroked his chin. He was wondering whether Frank Campbell, the new private secretary he had engaged a few days before, could manage the many business matters that would come up during his absence from the city.

He had pondered this question for only a few seconds when Campbell himself, a smooth-shaven, alert-looking man, stepped into the private office.

"Take a chair, Campbell," said Forbes. And he motioned Campbell to the chair beside his desk.

"I am leaving to-night for Pittsburgh for my monthly meeting with the superintendents of the mills," the president continued. "I shall be gone about five days. Do you think you've got the hang of the office so that you can manage things until I come back?"

"I feel sure that I can," answered Campbell in such a reassuring tone that Mr. Forbes was inwardly satisfied that he could.

"You have n't been here very long, but I've noticed that you are taking hold of affairs very rapidly," said Mr. Forbes, and then added: "If anything urgent does come up, you can get me at the Fort Pitt Hotel where I shall stay."

"If Mr. Lambert should come in to see me about the finance committee's report," continued Mr. Forbes, "you might find out his opinion on the recommendation for the new bonus system." And for the next five minutes he gave Campbell instructions about a number of different matters, while Campbell jotted down the main facts. "I think that will help you," concluded Mr. Forbes.

"Shall I look after train accommodations and the other matters?" asked the private secretary.

"Yes, if you will," answered Mr. Forbes. "I want to go on the five o'clock train."

After the secretary had left the private office for the outside office, Mr. Forbes listened intently. He heard Campbell telephone to his butler to pack his suit-case and to have the automobile down at the office by 4:30. He heard him telephone to the Grand Central Station to reserve a stateroom on the five o'clock train. He heard him dictate a telegram for hotel accommodations. With an appreciative smile he thought, "He is learning the position rapidly." Then he turned his attention to the letters on his desk.

The new position must be quickly mastered

Although the secretary has had experience or knows the various things that the secretary should know, nevertheless he is by no means fully prepared to serve his employer. The experienced secretary knows, and the beginner will quickly realize, that there is a vast amount of knowledge which he must secure just as soon as he can. ✓ In other words, he must learn his job — the particular job of being the private secretary to his new employer; he must catch up with his position. ✓

This large amount of knowledge that the secretary must obtain before he can be of much assistance is divided into two main divisions: first, he must learn how his employer wants things done; second, he must secure answers to such questions as, "What

kind of man is the chief?" "What is his life history?" "Who are his personal friends?—his business friends?" "What peculiarities have these friends?" "What are the hobbies and activities of the employer?" "What has happened in the office before I came?" and so forth. These are only a few of the questions to which the secretary must find answers almost immediately, for it is only after he has acquired this knowledge that he is able to understand how he is to act. The learning of the job, then, is probably the most arduous task that will be performed by the secretary in his whole career in his position. During the first month or two the secretary should make every endeavor to master all these facts. Besides, he will have to carry on his regular daily duties at the same time.

Learning the employer's methods

The first step taken by the new secretary is to become acquainted with the employer's method of doing things. No two employers are exactly alike. Each has his own individual and peculiar methods. The secretary is there, not to force his ways on the employer, but to find out how the employer wants everything done and then to act in that way. Although the secretary's ways may be better, nevertheless it is wise at first to do things as they have been

done previously. Later, when the secretary will have more time, changes can be gradually brought about and new methods introduced.

The secretary should bring with him, of course, a knowledge of the more or less routine and mechanical duties, such, for instance, as the keeping of a record of engagements, the filing of correspondence, and the keeping of personal accounts. But in such matters as the composing of letters and the making of appointments — matters into which the element of the personal taste and desires of the employer enters — it is always best to discover the wishes of the chief. Even in the case of pure routine, it will be found that the chief will want his own peculiar way followed out to the letter. Whatever these desires may be, however strange his peculiarities are, they should be found out at once and then should be conformed with. Friction will thus be avoided.

✓ The desires of the chief can be discovered by observation and by tactful inquiries. Of the two, the first is the better method, for continual questioning by the secretary as to how the employer wants things done is exceedingly wearisome to him. The employer should be spared questions as much as possible, but the secretary should always have the courage to speak up and ask directly for information without which he cannot go ahead intelligently

with his work. A candid confession of ignorance is better than going ahead blindly. Many an employer will tell the secretary just how he is to perform certain acts. But in case no such information is forthcoming, the secretary should go ahead and act as best he can. If he is wrong, the employer will soon put him on the right road.

Learning about the employer

Since the secretary is going to act for his chief and since he is going to be in close contact with him, he should set about learning as much as he can concerning the employer. Not only should he learn as much about the business history of the employer as possible, but he should also become familiar with the chief's personal life and character.

In many instances a short history of the life of the chief can be found in a Who's Who, a social register, or a blue book. Informatory works of such types will give valuable information in the form of the main facts about the employer, such as the date of birth, parents, education, business connections, clubs, hobbies, and so on. If his name does not appear in these works, then the main facts must be gleaned by tactfully inquiring from persons who know. Many will be easily found who can give the secretary this information. At all

events, the secretary should secure the essential facts of the employer's life. These facts can be pieced together and woven into a more or less complete and up-to-date history.

The business history of the employer can be secured a little more readily and easily than can his personal history. Practically the same method is taken. If the former secretary has kept a diary or a file of newspaper clippings, a mine of material will be at hand for the present secretary to dig into. A reading of the correspondence files and files of important papers will also help to put the secretary into close touch with the past. Such investigation should be made as early as possible, since the information that can thus be secured will be of great aid in guiding the secretary in the forming of his decisions and in the performance of his duties.

The secretary should try to understand the chief. He should know his character and the way his mind works. Real intimacy with the employer cannot be achieved until the secretary does understand him. To gain this information the secretary must study his employer. He should think as nearly as possible along the same lines that the chief does. He cannot decide a question brought up unless he knows how his chief would himself have decided it. The secretary should get clearly in his mind just

what the chief is trying to do and then help him do it.

If, for example, the chief is given to procrastination — putting off the doing of things that ought to be done — the secretary should try to offset the fault by persistently bringing the matter to his attention until proper consideration of it has been secured. Such a course of action necessarily implies the use of much tact on the part of the secretary. Again, if the employer has the fault of acting undiplomatically, it is the duty of the secretary to be on his guard to prevent such happenings. (If he is unable to prevent them, he should do as much as possible to smooth them over and make reparation.)

No matter how tactful has been the persistence of the secretary to get the necessary thing done by the employer, friction sometimes occurs. The employer may even go so far as to vent his spleen on the secretary. The secretary, however, should not allow his feelings to be hurt by any such outburst. It may be hard to bear, but it is good training. Moreover, if the employer is any kind of man, he soon after realizes that what the secretary did was in his interest, and regrets his angry remarks. Such personal services as these are indeed the acts of a mature and experienced secretary, for they require a delicacy of touch foreign to the beginner.

They are founded, however, upon an understanding of the chief.

Personal intimacy with the employer

Personal intimacy with the employer — one of the compensations of the secretary's position — is given by the employer if the secretary has two characteristics: viz., trustworthiness, and tastes in common with those of his chief. If a secretary has the confidence of his employer, he has a reward for his trustworthiness. This confidence is not, however, the most valuable and pleasing reward which the secretary can gain, for confidence in the secretary does not imply a personal intimacy with him. The good secretary will try to gain not only the confidence of his employer, but also the personal intimacy with him. After these two things have been obtained, the secretarial position is indeed a pleasant one.

This personal intimacy is usually gained through tastes in common with those of the chief. The employer has a hobby of some kind. It may be that he has several hobbies. The secretary should find out what the main hobby or liking of the chief is and then should make it his own. Suppose, for instance, that the employer is interested greatly in the collection and knowledge of paintings. The secretary should study that subject. The employer

will be pleased to discover a kindred liking and knowledge. Conversations on the subject will ensue and result in another attachment between the chief and the secretary.

If the employer is deeply interested in charitable or philanthropic work outside his business, the secretary should become versed in it. As soon as the employer finds that the secretary has a well-rounded knowledge of his own hobby, his regard for him is likely to be increased. Moreover, he will ask for opinions on certain related matters. He will have the secretary act as substitute for him at committee meetings. His liking for the secretary will increase.

The various forms of recreation of the employer should not be overlooked. If he is forever telling how he made the fifth hole in three and how he overcame slicing his drives, then it is high time for the secretary to take up golf or to gain a general knowledge of it. The employer will soon learn that his secretary is a golfer and the monotony of business work in the office will be frequently relieved by conversations on golf.

The work and effort expended in the acquiring of a fair knowledge of the hobbies of the chief is much, but it is a valuable knowledge and will broaden the secretary, make him a bigger man for the future, and a better man for the place. Not only should

the secretary see that by possessing such information he is of more value to his employer but also should he realize that he is educating and bettering himself. ✓

Employer's friends and important callers

Another heavy task which the secretary should immediately set about completing is that of learning about the friends and acquaintances of the employer and about the important callers at the office. The importance of doing this work as soon as possible after the secretary has started in on his new position is evident, for unless he has that knowledge he will be unable to accord the consideration and special attentions that should be accorded. The various directions given in preceding paragraphs in regard to finding out about the personal and business histories of the employer can be made use of in acquiring the necessary knowledge. Again, constant observation of how the employer acts towards certain callers will be of aid because it will serve as an indication of how the secretary should act. The secretary will soon learn, for example, which friend is to have the right of way in luncheon engagements, who has the privilege of walking unannounced into the private office, and so on.

The secretary, moreover, should strive to get into

the good graces of his employer's friends. He should be able to recall their names. He should know their peculiarities and characteristics. He should know their personal and business relations with the employer, their interests in life, their hobbies, and so on. He ought to make it a point to learn these things so that he can converse pleasantly with them on topics in which they have an interest. Such points of information will also aid him in avoiding *faux pas* — social blunders.

If the employer has many important men calling on him, it is wise to make note of their names. Later these names can be looked up in Who's Who or in other books that will give the kind of information desired. Or inquiries can be instituted to find out about them. The names should then be remembered so that the secretary can recall them at once. As an aid to remembering names, the secretary will find it of help to attach to the name of the caller some point of distinction about him, as, his clothes, his manner, or any other noticeable fact in his physical appearance. The next time the caller comes in, the secretary will be able to call him by name. Such a little act as that, even, is quickly noticed and appreciated by the caller. It shows that the secretary has taken enough interest in him to remember his name and to greet him by name when he calls. The caller's vanity is

tickled when he is immediately saluted by name by the secretary. The secretary should always strive to remember names and to use them.

Learning of past events

Of special difficulty to the new secretary is the learning of past events concerning the office. In many cases no diary of past events will be at the disposal of the new secretary to give him all the information that he must have. A careful reading of back correspondence files will be of help. Inquiries made of subordinates or associated workers will also be productive. By keeping his ears open, the secretary will hear of various bits of past history concerning the office and the policy heretofore pursued. Most of these bits will be only casually mentioned in conversation and the secretary must indeed be sharp and alert to get them. The secretary should bear in mind the fact that the more he knows about the office, the more valuable he is. He will be the last resource for information on many a point. Time and again will an employer ask for information about things which took place in the office long before the secretary began his work there. The secretary, nevertheless, should know. He must be the chief's memory for such things.

In conclusion, then, let it be stated again that

the secretary in going into a new position has a vast amount of information to acquire. He must catch up with the employer and the office in knowledge. The quicker he does it, the better it is for himself and his employer.

CHAPTER II

MANAGING CALLERS

"Did a Mr. Russell call to see me last Tuesday?" questioned John Forbes, of the Forbes Steel Company, as he glanced up from the letters that lay opened before him on his desk and looked at Campbell, his new private secretary.

"Last Tuesday?" said Campbell as he wrinkled his brow in thought. "I can't recall, but I can easily find out from my list."

"Perhaps you will recall him if I describe him," said the chief. "He is short, about five feet three; slim; has a heavy, gray mustache; is rather poorly dressed; and wears gold-rimmed spectacles. Do you recall any one looking like that?"

~~X~~The look on Campbell's face told the chief that Campbell did recall.~~+~~

"Yes," answered Campbell thoughtfully, "a man of that description was here. He wanted to see you but I did n't let him in because he would n't tell me his business with you." Then he added, "Moreover, he did n't look as if he should be admitted to see you."

"I thought so," murmured the chief to himself but loud enough for Campbell to hear. "Just read this letter," he continued, and handed to his secretary the letter which lay on top of the pile.

As Campbell rapidly scanned the letter, the chief watched his face. He smiled guardedly as he noticed the look of consternation grow in Campbell's eyes.

And no wonder that Campbell's face fell, for from the letter he learned that he had refused admittance to George M. Russell, whom he recognized from the letterhead as a valuable customer of the Forbes Steel Company.

"Don't take it so much to heart," resumed Forbes. "You made a mistake that any one could make. Mr. Russell is rather eccentric in his ideas on clothes and he must be handled with a great deal of tact. But this is a good time to give you a hint or two.

"In the first place," continued the chief, "don't make the mistake of judging people solely by the clothes they wear. In most cases it is safe to do so but there are exceptions, as the case of Mr. Russell has proved. In the second place, if a caller won't tell the reason for seeing me, you must use tact to find out. If you had taken both these precautions, you would have allowed Mr. Russell to see me. Remember, too, that the correct managing

of callers is not only important but is also mighty difficult."

After a short pause, he said, "Send in Miss Andrews for dictation."

Importance of the duty of managing callers

✓The secretary meets and manages callers. ✓ The correct performance of this duty is important because it means a saving of from one to three hours each day in the executive's time — hours that can easily be wasted if every caller at the office is granted admittance to the chief. Again, the employer will be subjected to many annoyances, worries, and disagreeable experiences if beggars, cranks, and others of such types are freely admitted. This duty of acting as buffer between the employer and the caller is difficult, for it involves the exercise of great tact and discretion on the part of the secretary if he is to be at all successful. The secretary, in other words, must be able "to meet people."

Wishes of employer in regard to callers

Employers may be roughly divided into two main classes as follows: (1) those employers who will see any one; (2) those employers who leave the whole matter of seeing visitors and admitting them to the private office to the discretion of the secre-

tary. The first-named class is composed of the democratic employers who, in their regard for what they believe to be the rights of others, are neglectful of their own rights and interests; and of those who, because they hold public offices, deem it a wise policy to grant free access to any one. The second-named class is, as a whole, truly businesslike in the consideration that time is money — and that time can be easily wasted if every caller is allowed to secure admittance. The true private secretary should strive by a gradual and tactful process to get his democratic employer to permit him to change the system of giving audience to every one. The secretary's duty, it will be recalled, is to help the executive as much as possible. By saving the employer time and annoyances, he will accomplish that aim. Hence, it is the secretary's duty to protect, if he is able, his democratic employer from his own fault. Of course, the wishes of the employer should be followed out, but perhaps after a few trials he will see that by allowing the secretary to handle the callers he is not wasting so much time as he had wasted before, and that he is relieved of some disagreeable experiences. Such a plan the secretary might attempt to put into practice after he has become well acquainted with his position and his employer.

The employers of the second class are by far in



the majority. One of the reasons that an employer of this class has for hiring a private secretary is that the secretary will save him time and trouble by keeping from his private office unimportant and troublesome visitors. Although he may give explicit instructions as to who may and who may not be admitted, yet such instructions cannot be so detailed that the secretary is not called upon to exercise his own discretion. The secretary should be extremely careful in granting admittance to the private office. In deciding about the admittance of callers, the secretary should consider above everything else the time and wishes of the employer. Some very important men are of a retiring disposition and do not wish to meet many of the visitors. The secretary should recognize the temper and disposition of the employer and should be very careful in making appointments and allowing callers to talk with the employer unless he is sure that the chief would like to see those persons.

Understanding how to handle callers

In a busy office the private secretary must take care of at least one half of the callers who come to see the chief. Every caller, however, has the idea that his reason for seeing the chief is important enough to command a personal hearing,

That the caller has such an impression, the secretary must understand before he is able to cope with the case. He must also realize that the caller came not to see him but to see the chief. If the secretary will but keep in mind those two facts, his task of handling the caller will be made all the easier.

The secretary who gets rid of callers and induces them to leave the office is not necessarily a good secretary. The secretary is striving for results all the time. One of the greatest results that the secretary can achieve is to have every visitor who has been denied admittance to the chief leave with a warm spot in his heart for the treatment he has received at this particular office. It is an easy matter to say "No" and get rid of the caller. If that were all there was to be done and if that were the correct way, then the office boy could handle the callers.

All callers must be handled tactfully. There should never be any flat refusals, for such might give rise to public stories. Most "big" men are very sensitive to public stories and news about them, especially if they are of an unpleasant nature. Energy should be expended not in striving to get rid of visitors, but in trying to give them two impressions: (1) that they have been well and courteously treated; and (2) that they have accomplished with

the secretary as much as they could have accomplished with the employer — that they have done about the same as see the chief. To give callers these two impressions, the secretary must be courteous and sympathetic; he should strive to please and to do as much as possible for the callers.

Proper manner toward callers

A proper manner toward callers is the first thing a secretary should train himself in, for nothing has a greater effect on the caller than the reception he receives at the hands of the secretary. Whatever the secretary does reflects credit or discredit upon the employer and the business. In the mind of the caller the secretary is the institution — the representative of the head. Hence, whatever impressions are received from the acts of the secretary are transferred to the institution or to the secretary's employer. A proper manner is made up of sincere courtesy, tact, and self-possession. No matter who the caller is, he should be greeted in a courteous way and should be shown consideration. The secretary should not regard the caller as an intruder. It certainly will never injure the secretary to act courteously to every caller, even though his dress marks him out to be of the poor class. Incorrect judgments have been made many times from the clothes a man wears. Courtesy, moreover, should

be made a habit — not something to be shown to a chosen few ; otherwise it is insincere and hypocritical and will be noticed for what it really is. It is well worth the secretary's while to make every new acquaintance met in this way feel glad that he has met him.

Two facts about the caller should always be ascertained by the secretary if possible. These facts are as follows : (1) the name of the caller ; (2) the business which brings the caller to the office. Only when the secretary has such facts in his possession will he be able to decide whether the caller is to be admitted to the private office. Of course, if the secretary can handle the business of the caller himself, he will save the employer trouble. And, in many cases, the secretary can do more for the caller than can the employer. The secretary will soon find that he can send away satisfied a great majority of the callers who come primarily to see the chief.

The business of the caller with the employer is usually the criterion of whether or not the caller is to be admitted, but not always. Even though the caller's business may be unimportant, and he may not be a known friend of the employer, his name may be such that it would constitute an "open sesame." The visitor may be some one of distinction or influence, and the secretary's ignorance of his name

may give him offense and may indirectly cause the superior officer embarrassment or even loss.

✓ There are two main reasons for getting the name of the caller: in the first place, the employer might have instructed the secretary never to admit a certain person; in the second place, the secretary and the employer should know to whom they talk and what consideration should be given to the possessor of that name.

Likewise are there two reasons for ascertaining the business of the caller. The first reason is that the secretary must decide if the caller's business at the office is important enough for the employer's consideration. The second reason is that the employer will be prepared for the caller if he knows what has brought the caller to his office. ✓ In fact, some good business men, after having learned of the business of the caller through the secretary, will make an appointment for the next day and, in the interval, will look up and prepare themselves on the business that the caller desired to discuss.

In handling callers, the secretary will find that it is most difficult to worm out of the caller the business he has at the office, or his reason for desiring to see the chief. In obtaining this knowledge, the secretary will be aided by his use of courtesy. If the secretary is cold toward the caller, he will never gain his confidence. Hence, by being

courteous to the caller, the secretary not only makes the caller friendly to him and his employer but also finds that his own work in questioning the caller is made easier.

When the visitor is rather obstinate about revealing his name and business (a common occurrence, for nearly every caller thinks that he *must* see the employer no matter how trivial his business may be), despite the courteous reception and inquiry by the secretary, the secretary will find his recourse in tact. The strategy which the secretary is compelled to use sometimes to secure the desired information would do credit to a diplomat. Alertness, patience, and an express desire to do all he can for the caller are needed. Sympathize with the caller, make friends with him, try to draw him out in a general conversation which always leads back to what his business with the employer is — such acts must be done before the secretary is successful with the caller. All this is done quickly, of course, and the caller is kept unconscious and unsuspecting, as far as possible, of what the secretary is striving for. When the secretary has mastered such detail in handling callers, he will be surprised at the ease with which he gets visitors, at first obstinate, to confide in him.

Self-possession or self-confidence is of aid to the secretary. He must keep a strong grip on the sit-

uation; he must dominate it. If the caller sees that the secretary is timid, uncertain, and apparently does not know what to do, he will try in many instances to bluff his way through. Quiet self-possession, and by that aggressiveness is not meant, not only will prevent the aggressive caller from breaking through, but also will be of help in gaining the confidence of the caller.

Alertness of mind, quick wits, and the active comprehension of the situation are also of aid in helping the secretary to solve his puzzles and to gain his ends. But whatever is done in "sizing up" the caller, in determining his status, and in disposing of his case, must be done quickly. Experience and a quick brain will soon make the secretary proficient in the smooth and polished manner of handling callers.

Model conversations in handling callers

Until the secretary has had experience in handling callers and in getting from them the information that he wishes, it is wise for him to plan out his methods of managing callers. If he has his plan all arranged in advance to meet the various exigencies and the different cases which may arise, he is very likely to achieve his purpose diplomatically and quickly. A few model conversations which show how various callers are handled will serve to in-

dicating how the secretary can best handle each situation.

The secretary should realize that the very first few words with which he greets the caller generally determine the attitude of the caller toward him. Since the secretary is usually about to try to find out certain facts concerning the caller, he will find it wise to cultivate a greeting which will not antagonize the caller. A tactful, well-mannered approach will usually break down the visitor's reserve. It is better to say "Good morning" or "Good afternoon" or "Is there something I can do for you?" than it is to say "What do you want?" The greeting should be given courteously and should usually be accompanied by the secretary arising from his chair and advancing toward the visitor.

When name is not given by the caller

SECRETARY: Good morning. (A nod and a questioning look.)

CALLER: I wish to see Mr. Blank.

S: Mr. Blank is rather busy just now. May I have your name (or card)?

C: Oh, that's all right. Mr. Blank will know who is calling. Just tell him I am here. He will know who it is.

S: (Attitude is determined by the secretary's

estimation of the caller.) I am Mr. Blank's private secretary, and if you will give me your name it will help me to get Mr. Blank to see you.

(Caller still refuses to give his name.)

(The secretary is a little uncertain as to the importance of the caller's business, or has been instructed to be strict in allowing callers to see Mr. Blank.)

S (continuing): If I were to tell Mr. Blank some one was outside, he would say "Who is it?" It will help if you will give me your name and tell me what you wish to see Mr. Blank about.

(If now the caller does not give his name and business, the secretary's treatment depends upon the judgment he has arrived at regarding him. Usually, however, the caller will at this point give in or leave, for he will see the futility of further argument because of the secretary's determined stand.)

When business is not given by the caller

SECRETARY: Good afternoon. (Nod and questioning look.)

CALLER: I want to see Mr. Blank.

S: Mr. Blank is rather busy just now. May I have your name?

C: Mr. Smith.

S: And you wish to see him about —?

C: This is a personal matter.

S: I am Mr. Blank's private secretary. If you will tell me just what you want to see him about, I shall try to help you.

C: This is purely a personal matter.

(The secretary is favorably impressed by the caller's appearance and decides that he should strive further to find out what the caller's business is. The secretary will now start an easy conversation — general in nature, but with the purpose of finding out the caller's business. If this be learned and deemed important enough for the chief's consideration, the secretary will go into the private office and announce the caller. If it is considered to be a matter which the secretary himself can handle, he will manage it himself.)

Business not important

S: How do you do? (Nod and a questioning but pleasant look.)

C: I wish to see the president.

S: The president is engaged just now. May I have your name?

C: Mr. Blank.

S: You want to see him about —?

C: (Mentions a subject which can better be referred to some other department for handling.)

S: The president is engaged now and is unable to see you but possibly I can help you.

(The secretary should then take up the caller's business and make arrangements for having it dealt with properly by the necessary department.)

Other conversations

C: Is Mr. Blank in?

S: I will see. (Although the secretary knows that his employer is in, it is not necessary that he should say "Yes." The expression-that is used is merely a diplomatic expression to save the caller's feelings, for if the secretary was so scrupulous about what he said, he might frankly say, "Yes, Mr. Blank is in, but whether or not he can see you depends upon what your business is here.") What do you wish to see him about?

C: Here's my card.

(The card shows that he is a bond salesman.)

The secretary can now dispose of the matter. He will tell the salesman that Mr. Blank buys his bonds through his regular broker, or he can give him whatever other reason he has for not allowing him to see Mr. Blank.

If the chief is in, the secretary should not tell the caller that he is out, merely to get rid of the caller. Many embarrassing situations will arise if the secretary does thus misinform the caller.

The employer might just at that moment walk out of the office in the very face of the caller; or while the caller is still in the outside office, the secretary may have to answer the telephone to find that he must, by his conversation within hearing of the caller, give away to the caller the news that he (the caller) has been misinformed. Nothing can be lost by the secretary's adherence to the facts. The remark, "Mr. Blank is engaged just now and will be unable to see you," is franker and more efficient.

After the secretary has satisfied himself that the caller should be permitted to see the chief, he should go into the private office and announce the caller. He should give the chief the name and business of the caller and also any facts about either the caller or his business of which he believes the chief to be uninformed. He can then go to the office door and ask the caller to enter. In some offices in which the secretary is not allowed so much discretion, the secretary will carry the caller's card and reason for calling to the chief to learn if the employer will see the caller. If the employer does not wish to see him, the secretary will leave the private office and then tell the caller, "I'm sorry. Mr. Blank is in a conference just now and is unable to see you," or something to that effect.

If it is necessary that the caller wait, the secretary should ask him to be seated. But if the em-

ployer is to be engaged for some time, it is best to tell the caller of the conditions and to ask him whether he wishes to wait longer or make an appointment to see the chief at some other time,

When the secretary is in a large concern, he should keep himself well informed of the individuals who make up the personnel of the offices and of the duties of the various managers and heads of departments so that he may be able to refer the caller to the proper persons when the occasion demands it.

In certain offices where important matters are constantly being dealt with and also in the ordinary office where a very important matter might arise suddenly, a different plan has sometimes to be followed out to get the best results. The caller who comes to the office with an important matter comes prepared, and because of this preparation, if he is admitted to the chief's office, he will have a decided advantage over the chief in discussing the business. The suggestion is therefore given of taking the name and business of the caller to the chief. The latter upon seeing the importance of the proposition and upon realizing that he ought to be prepared to discuss it when he meets the caller should do one of two things: either he should come out and greet the caller cordially and say that he is prevented from taking up the caller's business at present be-

cause of (and here a reason should be given) ; or he may tell his secretary to ask the caller to make an engagement for the following day. In the meantime, both the secretary and the employer can prepare for the discussion of the important matter.

➤ In still other offices, appointments with callers are always made, if the secretary thinks that the matter is of sufficient importance, for the next day. At his first call, the caller is told by the secretary that "Mr. Harrow is at a conference" (or some other reason is given) "and is unable to see you. If you will come to-morrow at eleven o'clock, I think he will be free." Such a tentative engagement can be canceled if the employer has something of more importance to attend to or does not care, upon having the caller looked up, to keep the appointment. If the person with whom the engagement has been made can be reached by telephone, the secretary can say that "Mr. Harrow was unexpectedly called away and will be unable to see you until next week," or, "Mr. Harrow is still busy on the matter he was working on yesterday and will be unable to see you," or some other reason can be given.

Miscellaneous points about handling callers

In some offices four or five callers may arrive at one time to see the chief. It may happen that all

of these four or five are there on matters which the chief would care to see them about. In such event, the secretary will be hard put to it to keep a grip on the situation. Each of the callers will have the idea that his business or he himself is of such importance that he ought to be admitted immediately. Unless the secretary is tactful in handling these cases he is likely to find that the caller, himself a busy man, will become disgruntled and will leave. The result of this is that the employer is deprived of an opportunity which he may have been waiting for. ✓ It is part therefore of the secretary's duty to exercise such finesse that he can keep four or five callers in the office content to wait their turns. If it happens that these callers are big men themselves, it may be wise for the secretary to go into the private office, and, interrupting the employer, tell him of the situation and try to get him to come outside to see the callers in turn. ✓

When the callers see that the man on whom they called is striving as best he can to dispose of their cases and is busily engaged in talking to one of their number, they will be satisfied to wait a little longer.

Sometimes a caller after his admittance to the office of the chief overstays a reasonable time or his allotted time. Not only should the secretary exercise his discretion in admitting callers but he should also be alert in regard to the time they are taking. ✓

The chief may not care to interrupt his caller and seem curt in dismissing him. Moreover, there may be a caller or two waiting patiently to see the executive. If the executive does not know that there are others waiting, he may allow the caller to keep on talking. In such an event, the secretary might go into the private office and tell his chief that he has an engagement at this time. He might remark: "Pardon my interruption — you have an appointment at this time." At this point the caller ought to take the hint and leave. If he proves to be tenacious in his hold on the chief, the latter will probably sense the situation and will mention the fact of the appointment. Even that will not be necessary in most cases.

As has been said in a preceding chapter, the secretary should show especial consideration to friends and members of the chief's family. He should always be prepared to make the personal remarks which show that he is taking an interest in who they are and what they are doing.

Reporters also should be carefully treated, for reporters can be of great help to the secretary's employer. Everything possible should be done to aid them in getting the information they want. At the same time it should be remembered by the secretary that reporters, as a class, are keen observers of human nature. They appreciate fair treatment,

but usually they abhor a fawning manner. The secretary will achieve more by acting frankly and candidly with them than he will by striving to color or distort facts in favor of his employer.

It sometimes happens that callers come to see the executive while the executive is out. In such a case the secretary should take the name and business of the callers and make a note of them. If the business merits consideration, he should make an appointment with the visitor to see the executive when the executive will be in. It may happen that the secretary will be unable to set any definite time for the engagement. He should then ask the caller to telephone at a certain time and he (the secretary) can then tell when he may see the executive. Or it might be wise in other instances to take the address and telephone number of the caller and tell him that he will be called up and informed as to the time when he may see the executive.

A word should be said about callers who present letters of introduction to the chief. In many cases the unsuspecting secretary takes the letter to the chief. The latter upon reading the letter finds that he has been interrupted to read a letter from some one whom he does not know, introducing some one who desires a favor or who wishes to present an unimportant matter. Such letters have so often served just to gain admittance to the chief and have

been misused so frequently that the secretary should scrutinize them. When the letter is presented by the caller, even though this letter may be sealed and addressed personally to the chief, the secretary should open the envelope and glance at the letter in order to judge whether the caller should be admitted. ✓ In other words, the secretary should not admit to the private office of his chief any caller who happens to come in with a letter of introduction. ✓

✓ Another qualification which the secretary is sometimes called upon to have is the ability to "keep things going" if the chief is late in keeping an appointment. ✓ A puncture in a tire of his automobile, a meeting of a friend, may delay the chief in keeping an appointment at his private office. There may be two or three callers who are thus unavoidably inconvenienced in their wait for the chief. If such a case does arise the secretary will try to keep the callers content and willing to wait a little longer. Conversation can be entered into with the callers and in this way, if the conversation is pleasant enough, the embarrassing minutes will quickly pass until the chief comes.

If the chief is a busy man and if his appointments come close together, with no interval between, the secretary must be especially watchful to see that the schedule of appointments is maintained as nearly

as possible. ✓ If one caller overstays the allotted time by fifteen minutes, it might easily mean that every other appointment throughout that day will be about fifteen minutes late. Such a condition of affairs must be avoided, if possible. The secretary should try to get the caller who is overstaying his time to leave. He should also try to cut down the duration of the subsequent appointments so that he may as quickly as possible catch up with the schedule that had been arranged.

Mechanical aids in handling callers

There are certain mechanical aids in the handling of callers which should be known by the secretary so that he may make use of them in his own position if he finds need for them. These mechanical devices will be found to be helpful in the correct and easy handling of office visitors.

✓ In the first place, the physical arrangement of the office is a matter of importance. The secretary's desk should be so placed that he can guard the door of the private office; so that every one who enters the door may be seen; and so that, if the emergency arises, the secretary by physical means can prevent the entrance of an undesirable. In some offices the secretary's desk is railed off. If this device is present, the secretary can greet the caller and determine his status before he allows him

to come inside the railing. For those who have passed this test, chairs may be provided in the secretary's inclosure. If the executive is busy, the caller can be asked to take a chair until the executive is disengaged. Thus, callers whose business is not at all important can be kept out of even the secretary's inclosure and their cases can be dismissed much more rapidly than if the callers are first provided with chairs. After some people once get into a chair, it is nearly impossible to get them out of it. Such a device as a railing, however, is more suited to the purely business office than it is to the private office of an important man.

It is sometimes desirable that the executive should have a double office, that is to say, two adjoining private rooms. One caller can then be ushered into one office while the executive is consulting with a previous caller in his other office. Moreover, this device is efficient in that on certain occasions where the caller has overstayed his welcome with the executive, the latter can excuse himself by mentioning some reason or other. He can then arise and go into his other private office where he can begin on some executive problem that needs his attention. If the two private offices are divided by a partition, it would be well to have this partition sound-proof.

Likewise is it found of necessity in some instances

to have a prearranged signal which will inform the secretary that he is to come to the private office and relieve the employer of the caller. This signaling can be done by the employer who can press his foot on a button under his desk. A buzzer is thereby set in operation by which the secretary is informed of what is wanted. He can then go into the private office and say to the caller: "Pardon my interruption." Then he will turn to his employer and say, for instance, "You have n't forgotten your appointment with Mr. Harris, have you?" At this hint, the caller will probably take his departure.

It is sometimes necessary that the secretary ask the caller to wait. In order to keep the caller contented, it has been found expedient to have a table in the office covered with magazines. The secretary can either intimate to the caller that he select one of the magazines and glance over it while he is waiting or the secretary himself may select one and hand it to the caller. Newspapers can also be kept on file in the waiting office for the convenience of callers. In the outside offices of some large manufacturing concerns a display of samples of the articles manufactured by the concern is kept on exhibition. As the caller may have come to see the executive about certain of these articles, he will be interested in looking them over while he is waiting.

CHAPTER III

HANDLING CORRESPONDENCE .

"COME in with me for a minute," said John Forbes after he had responded to the hearty "Good morning" of his secretary and was entering the doorway of his private office.

Frank Campbell, who had been appointed secretary to the head of the Forbes Steel Company a short time before, silently followed his chief.

"I have n't had much time to instruct you in your work," said the chief as he pulled off his gloves, "but I'm going to take a few minutes now to go over some of the points you have to handle. Take a chair."

As he spoke these last words, Mr. Forbes himself sat down in the chair at his desk. In front of him on his desk lay a pile of forty or fifty letters — all unopened.

"How long would it take me to open, read, and answer these letters?" questioned Mr. Forbes.

"About an hour and a half or two hours," answered Campbell thoughtfully.

"That's about right," said Mr. Forbes. "And

I can't spare that time. One of my reasons for having a secretary is that I shall be saved as much time as possible. Just watch me now as I go through this mail."

Mr. Forbes picked up an envelope marked "Personal," opened it, merely glanced at it, and handed it to Campbell. It was a letter that asked for a contribution of \$5 to the Eastern Missionary Society.

A second letter, marked "Important" was next opened. It was another request for a contribution.

A third letter gave the details of a new issue of bonds of a well-known railway.

A fourth letter told of the spring opening of a men's tailor.

After all the letters had been opened and read, Mr. Forbes again addressed Campbell.

"Out of all these letters," he said as he finished, "there are just ten that you ought to have placed on my desk. Of the others, you should have thrown away about twenty. The remainder you should reply to. In order to find out the important or personal letters that I should see, you should open all the letters excepting those few occasional letters from members of my family. You will soon be able to distinguish them by the handwriting and other identifying marks. Moreover, if you are ever doubtful about how to reply to letters of the unimportant kind, don't be timid about asking me.

"I should like to tell you more," Forbes continued, as he glanced at his watch, "but I have an engagement at 10:15. You might, however, take off part of this afternoon and go down to see Mr. Ackery's private secretary — he's down in the Equitable Building — and get him to show you how he handles correspondence. The sooner you learn, the sooner will you save me valuable time."

Sorting and opening the mail

Much time can be saved for the executive if his secretary is given complete direction of the handling of correspondence. The true executive has not much time for anything but creative work. He can very easily waste two or three hours a day by personal attention to his mail. This personal attention would include such matters as opening his letters, reading them, dictating answers, and often even such work as distributing and sending letters to their correct destinations. All this, as a matter of fact, should be looked out for by the private secretary.

The handling of mail then will be about the first thing that the secretary will do when he reaches the office in the morning. As a rule, he should arrive at the office early enough so that he will have plenty of time to prepare the mail and digest the contents of the various letters before his chief arrives.

All mail for the executive and private office should be placed on the secretary's desk. The secretary should first rapidly run over with his eye the addresses on the letters and other mail. In this way he will be able to pick out any letters to the chief from his immediate family. These he will, after a little experience, be able to distinguish by the handwriting, seal, or other distinctive and familiar mark. If any letter of this nature is met with, it should not be opened but should be laid aside to be given unopened to the chief. Very rarely will the secretary be instructed by the employer to leave unopened letters other than these. Again, the secretary by glancing over the faces of the envelopes will be able to see from the addresses if every letter belongs properly on his desk.

Many letters marked "Personal," "Private," "Important," or "Confidential," will be received. The secretary should treat such letters as he does the ordinary letters, for letters so marked are seldom, if ever, personal or important. As a matter of fact, they are likely to contain less personal or less important matter than that which the ordinary letters contain. The writers of such letters usually mark their letters "Personal" or "Important" because they hope to have the letters delivered into the hands of the executive through the aid of these words. Such letters upon being opened are

found in many instances to be begging letters. Such notations on the face of the envelopes, therefore, are to be disregarded.

After the secretary has scanned the mail in the manner just described, he should gather the letters, still unopened, into a pile with the edges even and with all the address sides toward him. Then he should pound them on his desk on their left, narrow sides. This pounding will force the letter-sheet inside the envelope, and also the inclosures if there are any, down as far as possible from the top (the right-hand, narrow sides). The purpose of this pounding is to prevent any letter-sheet, or inclosure, from being cut while its envelope is being opened. In some instances if this pounding is not done, a strip of the letter is cut off during the process of cutting the envelope. This strip can very easily have on it a figure or part of a word, the loss of which may possibly affect the reading of the letter. Moreover, the chances of injury to any other inclosures the envelope may contain are lessened. If an automatic letter opener is not at the disposal of the secretary, a pair of scissors will be found most satisfactory for the purpose of cutting a sliver of paper off the right-hand narrow edge of the envelope. After he has opened all the envelopes, he should read and examine each letter by itself. He should carefully examine the interior of the en-

velope for possible inclosures. Every inclosure should be pinned or otherwise attached to the letter-sheet. The number of inclosures should be marked or checked on the letter-sheet and a description should be given, for examples, *2 Incls: 2 tickets to the Charity Ball, or Check for \$150.* Thus a record can be kept on the original sheet of the exact contents that *were received* with the letter. If this method is followed, disputes if they arise can be easily and quickly settled. Moreover, the secretary is saved much worry as to whether or not a certain inclosure was received.

Envelopes that have been cut should not be thrown immediately into the waste basket. They should be piled together and kept for that day. If such precaution is taken, the postmark or the return card on the envelope will be at hand to give the often needed and valuable information about the time and place of mailing and the address of the sender. At the end of the day these envelopes, if no longer needed because of the disposal of their contents, may be thrown away. This little precaution may save the secretary annoying experiences.

After the inclosure has been pinned or otherwise attached to the letter sheet, the date of receipt of the letter may be stamped on the letter with a rubber stamp. Time stamping machines are sometimes

used to stamp time of receipt of the letter. The secretary should then carefully read and digest the contents of the letter. After the secretary has read the letter, he should place it in one of three piles as follows:

1. Pile 1. Letters that are in his mind important or personal enough to merit consideration by the employer.

Pile 2. Letters which before they can be answered by the secretary require that information be first obtained.

Pile 3. Unimportant letters and letters that the secretary himself can handle immediately.

If the letter is of sufficient importance in the mind of the secretary to merit the consideration of the employer, it is laid in a separate pile (Pile 1). If the employer permits, the secretary may pencil on the letters of this class, while he is reading them and also after he has read them, notations or information that will aid the chief in his understanding or answering of the letter. Other material, such as a carbon duplicate of the last letter received from the writer or a contract about whose terms the writer is inquiring — material that might be needed by the chief — should be procured and put with the letters. This act will anticipate his asking for such

material and will help him in the consideration and disposal of his letters.

While the secretary is reading letters of class 2 or 3 and after he has read them, he should mark the important parts of the letters in such a way that he will not miss those points in dictating his answers. By doing this, he will save himself time, for at dictation time he need not read the letter so carefully as he did at first.

Letters in pile 1 should be arranged with the most pleasing letters on top and the disagreeable letters on the bottom. This arrangement will allow the chief to begin his day's work by the reading of the pleasant letters first. A disagreeable letter on top of the pile might put him out of humor for the whole day. Important and personal matters should also be placed on top. To this pile should then be added any letters that have been expressly left unopened, to which reference was made in preceding paragraphs. The pile should then be put upon the employer's desk with a paper weight to hold the letters in place.

Telegrams that come into the office may be properly considered under the general heading of handling the mail, for they have the same standing as letters. All telegrams should be signed for and opened by the secretary. The latter act should be

performed immediately upon receipt of the telegram because the message may be of a pressing nature that demands quick action.

Answering letters

The secretary should not be timid about undertaking the answering of any letter which is not of such importance in nature as those taken in to the chief. At first, since the new secretary may not fully understand the policy or business of the chief or how the chief would handle such matters, it would be wise, after having written the answers to such letters, to ask the chief to look them over before they are mailed to their destinations. The chief will usually direct and guide the secretary in such cases. The secretary should not think that because he does not yet know the business or policy of the chief he ought not touch letters which are semi-important. Such an idea is erroneous. If the secretary did not start in to answer such letters, he would never learn; and the chief would be given much needless work. The secretary should continually watch and remember how the chief handles his letters and should then imitate his good qualities.

The secretary should make it a point to have all letters answered on the same day on which they are received, whenever it is possible. Courtesy and

good business demand that such should be the case. If letters cannot be handled on the day received for some reason or other, they should be acknowledged and then should be filed ahead in a "tickler" or follow-up system (see page 155) which will insure that the matter will be brought up for attention at the proper time.

When the secretary takes dictation

In many offices the private secretary takes dictation and does the transcribing on the typewriter. If this is the case and if the chief dictates answers to his letters word for word, the secretary should revise the chief's letters when they need revision. Theoretically, the secretary is supposed to put down on paper just what is said and just as the dictator said it. As a matter of fact, he should do no such thing, for a busy man in dictating letters will often be guilty of errors which would make his letter ridiculous if it were written just as he dictated it. In his concentration upon the idea, he is likely to become mixed in tense and mood, and his verb may not agree in number with the subject. These errors should be corrected by the secretary as the letter is being typed. For such revision of the employer's letters, the secretary must have a good knowledge of English grammar and rhetoric.

If the secretary does not fully understand what

the chief has said in his dictation, it is better not to interrupt the dictation until he has finished the letter. If the secretary cannot understand what the chief said, certainly the reader will never understand. It is much better to ask than it is to be compelled to write the letter over again because of incorrect words or ideas.

In the early stages of employment, the secretary will find that practically all letters are dictated to him word for word. Sooner or later the time arrives when the secretary has gained the confidence of his employer by his well-written letters and the employer will say: "I wish you would answer this letter for me. You know just about what I want to say in this matter," or he will say, "Just write a nice little answer to this letter and give the information asked for," or, "Say that I should have been delighted to accept their invitation but I have to be out of town on that date." When such a point has been reached, the secretary is being called upon to do the actual constructing of the letter. In order that he may be able to write the type of letter that the chief desires, the secretary should understand what he wants done from the tone of his voice, his attitude, and from the ways in which former similar letters have been handled. At first such directions as are given may seem rather vague, yet with ex-

perience the secretary will put into the letter just the right ideas in just the right tone.

After the letters have been typed they should be laid, together with their envelopes, upon the chief's desk. The proper inclosures should have been placed in the envelopes. After the chief has read and signed this outgoing mail the secretary should glance over the letters for any penciled corrections or changes made by the chief. He should also notice whether or not each letter has been signed. If everything is correct, the letter sheets are folded and put into the envelopes; then the envelopes are sealed and stamped. The secretary should be sure that the proper postage is used.

THE VARIOUS TYPES OF LETTERS

↓ Besides the ability to compose the common letter on business matters (see Chapter VI), the secretary should possess the requisite knowledge of good usage in regard to the writing of the various other types of letters which he may be called upon to make use of.

Third person notes

Although the third person notes are seldom used at the present time, certainly not so much as they were in the past, yet in certain cases the secretary

will be called upon to make use of such forms. Important men are usually in receipt of many invitations — invitations to join associations of a business nature, to attend public dinners, to speak at a public function, and to be present at certain other affairs. These invitations are often written in the formal or third person style. If they are written in such a style, they should be answered in the same style. A letter such as that which follows is received:

The National Manufacturers' Association
18 Wall Street
New York City

The National Manufacturers' Association desires the pleasure of the company of Mr. John M. Andrews at a farewell dinner given in the honor of its retiring president, Mr. Henry Fall Simmons, at eight o'clock on January 15, at the Hotel Astor, New York City.

R. S. V. P.

The chief has an important business engagement in Pittsburgh on that date. He says to his secretary, "Just answer this invitation and say that I cannot be there." The secretary will then write a letter such as this:

84 Nassau Street
New York City

Mr. John M. Andrews regrets that an engagement prevents him from accepting the kind invitation of the National Manu-

facturers' Association to be present at the farewell dinner to be given in honor of its retiring president, Mr. Henry Fall Simmons, at eight o'clock on January 15, at the Hotel Astor, New York City.

January seven,
Nineteen hundred and sixteen.

Whenever letters written in the third person style are received, answers to them should usually be written in the same form.

In other instances, third person letters will be found useful, especially in the handling of certain disagreeable matters, as, for example, letters begging explicitly or impliedly for money. Refusals to requests in these letters can best be given without much injury to the other person's feelings by means of the formal and impersonal letter. The secretary, for instance, has received in the morning's mail an envelope addressed to his employer and containing nothing but four \$5 tickets for a bazaar to be held by the St. Thomas's Church Association. If the employer does not indulge in this form of charity, the secretary will write and return the tickets:

The secretary is requested by Mr. Henry S. Henderson to inform the St. Thomas's Church Association that four tickets for the bazaar to be held at 7:30 o'clock on Monday, January 18, have been received; and that as he cannot be present or otherwise make use of these tickets, he is returning them.

Mr. Henderson expresses his sincere wish that the bazaar will be a success.

Great tact is needed in making refusals in such a way that the feelings of the other person are not injured. Hence, such letters of refusal must be carefully worded and arranged.

Several points should be noted in regard to these third person notes. The inside address, the salutation, the complimentary close, and signature are omitted. The date is generally, but not always, given. When it is given, it is spelled out in full, as,

November the second,
Nineteen hundred and fifteen.

and is generally placed at the left hand margin below the body of the letter. In certain formal invitations, usually engraved and issued in large numbers, there is no need for the date of the writing or sending of the letter, and hence the date does not appear. The four-page letter sheet is used with the fold at the right (see page 137). The regular business letter head should not be used. In fact, a pretty general rule for the secretary to follow is this: all letters with the exception of those purely on business matters should be written on the four-page letter sheet. These letter sheets bear a printed or engraved heading as,

115 Broad Street
Philadelphia

If no printed heading is on the letter sheets, the address of the writer should appear at the left-hand margin below the body of the letter and *above* the date, as,

115 Broad Street
Philadelphia
November the second

The third person is adhered to throughout. A common fault is the changing from the third person to the first or second person. The following letter is an example of this mistake:

Mr. George Angus Parsons thanks the United Charities League for its kind invitation to be present and speak at its Tenth Annual Conference to be held at three o'clock on Wednesday, September 6, at its building, 351 Hanley Street, Philadelphia.

Although I may not be able to arrive until 3:30, I believe that this will not disturb your arrangements.

Yours very truly,

George Angus Parsons

In the second sentence of the above letter a change is made to the first person. Such a change is incorrect. Moreover, a complimentary close and signature are incorrect in a third person note.

Another point to remark is the tenses of the verbs used in the letter. In the following letter *has been requested* should read *is requested*; *will be unable* should read *is unable*. The present tense is usually kept throughout.

The secretary has been requested by Mr. H. M. Forbes to inform Mr. S. R. Holmes that Mr. Forbes will be unable to accept his kind invitation to take luncheon with him at one o'clock on Wednesday at the New York Yacht Club.

Acceptances and refusals should be worded in as close accordance as possible with the original letter, although courtesy must also be combined.

Letter requesting appointment

The chief may sometimes tell the secretary to write and ask for an appointment on a certain day at a certain time with another important business man. The letter shown below is of the type commonly used.

16 Waverly Place
August two
1915

Dear Sir:

I am requested by Mr. John M. Williams to ask whether it would be convenient for you to see him at your office on Wednesday morning next, August 4, at eleven o'clock to discuss a matter concerning the Federal Reserve Law.

Yours faithfully,
F. M. Stress
Private Secretary

Mr. Frank H. Hand,
Woolworth Building,
New York City.

Letter making appointment

When a letter asking for an appointment is received and if the employer is willing and able to

make the appointment, such a letter is answered as follows:

Woolworth Building
August three
1915

Dear Sir:

Mr. Frank H. Hand requests me to inform you that he will be happy to meet you on Wednesday morning next, August 4, at eleven o'clock at his office.

Yours faithfully,
H. R. Price
Private Secretary

Mr. John M. Williams,
16 Waverly Place,
New York City.

Letter canceling an appointment

If the chief is unable to keep an appointment through certain unavoidable circumstances, the secretary should write to inform the other person of the fact.

Dear Sir:

Mr. R. M. Andrews was unexpectedly called away from New York and accordingly will be unable to see you at the hour set for your conference, four o'clock, Tuesday, October 26. Before he left, Mr. Andrews directed me to inform you that he was sincerely sorry to inconvenience you and that he hopes upon his return you will do him the honor of calling upon him.

Yours faithfully,
Francis Thorne
Secretary to Mr. Andrews

When the words denoting time, like "to-morrow" and "yesterday," are used in a letter, the date or the name of the day should be added, as, for instance, "I shall be glad to have you take luncheon with me to-morrow, Thursday." Even in letters in which the day is stated, the time may not be definite. The letter may have been written on Tuesday and may reach the other person on Friday; and it might read, "I shall be in New York next Friday and wish you would meet me." The person who received the letter would then be uncertain as to what "next Friday" meant. All chance of misunderstanding can be eliminated if the date is added, as, "next Friday, August 24."

In rare cases, a formal and impersonal note is used in writing to tradesmen. The following letter will illustrate:

854 Fifth Avenue

Mr. John R. Whiting desires Messrs. Lord & Taylor to send for his examination the cedar chest #542 advertised in this morning's (Friday) "Herald."

January 8, 1915.

Answering letters during the employer's absence

When the employer is absent, say on an extended business trip, and will not be back in the office for two weeks, it is the secretary's duty to look after the mail which comes in. Besides having to answer

and handle the mail of classes 2 and 3 (as shown on page 66) the secretary must now look after the mail of class 1. Although he himself has neither the power nor the knowledge with which to handle such matters as will appear in these important letters, nevertheless he must at least acknowledge the receipt of them. If the writer of the important letter receives no answer until after the chief comes back (two weeks from the present time), he becomes very much dissatisfied at the treatment that he has received. It is only fair and courteous that he should be told that the chief is away and for that reason the subject matter in his letter has not been acted upon. A model form of the kind of letter that is used in acknowledging such important matters is given below:

Dear Sir:

Your letter of June 30 to Mr. Hatches was received this morning. At the present time he is absent from the city. Upon his return on July 15 your letter will be immediately brought to his attention.

Yours very truly,

James Blake

Secretary to Mr. Hatches

In certain cases the chief will not be ready to give a definite answer in regard to the important matter which has come to him in the mail. In such cases, although the letter cannot be fully answered,

it should nevertheless be acknowledged. A model form is given below :

Dear Sir:

Mr. Tarryington has received your communication of January 8 in regard to the matter of the Atchison contract. He has the proposition under advisement and will let you know his decision within a few days.

Yours very truly,

John S. South

Private Secretary

Points on dictation

The following hints will be of aid to the secretary in dictating answers to letters :

1. Read the letter very carefully and understand what the writer says or tries to say.

2. As you read the letter pick out the subjects or questions which are to be answered and to these add questions or doubts which should be settled to make the answer to the letter complete. These questions may be numbered as you go along.

3. Gather the facts with which you are to answer the letter. Arrange them in the most logical order.

4. If there is a problem of policy involved, determine on your attitude before you start to dictate.

5. *Decide what action, if any, you wish to have the reader take, and make your message work toward that end.*

6. Consider carefully the kind of man the reader is and adapt yourself to him in language, mood, and character. If you find that you are unable to put yourself in the right mood and attitude, it is better to postpone the dictation. It is most important that the tone of your letter be suitable.

7. Dictate slowly and speak distinctly. By doing so you will be able to think accurately as you dictate and you will also be helping the transcriber.

8. Concentrate your thoughts upon the idea that you are trying to express and impress through the letter upon the reader. Continually keep the reader in mind and talk as if he sat facing you.

An aid to dictation and transcription, on the mechanical side, will be found in this hint: After the secretary has carefully read over the letters that he is to answer and when he is ready to dictate, he should place the figure "1" in the upper right-hand corner of the first letter to be answered. This number he should call out to his stenographer instead of the name and address of the person or persons to whom the letter is going. The second letter will be numbered "2," and so on. After the dictation of all the answers, the original letters with the numbers should be handed to the stenographer who can copy the names and addresses with little chance of error.

The tone of the letter

One of the difficult things about the writing of a letter is to put in the right tone. Every letter that is sent out by the secretary should have a certain atmosphere of quality and distinction, and should be written in a certain tone. As a general rule, it may be said that the tone of the letter is determined

by the position of the person addressed, by the degree of acquaintance with him, and by the nature of the communication. Moreover, the quality, distinction, and tone to be used are determined by the policy and standing of the firm with which the secretary's employer is connected. The character of the employer, therefore, should so permeate the secretary that he unconsciously puts into his letter a tone that conforms with that character.

The language used must be adapted to the reader. A certain spirit or tone in the letter is essential to the best results. The one writing or dictating the letter should consciously strive to use a type of English (conversational, formal, etc.) best suited to the reader. The tone of the letter aids greatly in making a favorable impression. It can be easily understood that letters to ladies should be polished, courteous, and non-colloquial in style. A letter written to a close friend of the employer would be in a colloquial style. Letters that are written to men known to be conservative should be written in a conservative style or tone. Letters written to people who are not well acquainted with the employer should not be so familiar in tone as letters written to the people who are well acquainted with the employer.

Once the tone or character of a letter has been decided upon, this tone should be adhered to

throughout. Any false note that is struck destroys the whole effect of the letter, as, for example, the last paragraph in the following letter:

250 State Street
Boston, Mass.
November 8, 1915

Dear Sir:

I am very sorry to inform you that Mr. Davis has been called out of the city on very pressing business and will be unable, therefore, to keep his appointment with you.

I shall be glad to make an appointment for November 15 at the same time if this hour is convenient for you.

Please be prompt in acknowledging this.

Respectfully yours,

H. R. Wilson,

Secretary to Mr. Davis

Mr. Arthur H. Marshall,
75 Court Street,
New York City.

Besides the style in which the writer adapts himself to the reader, besides the established tone in the correspondence of the employer, there is still another tone which comes from business sense and which applies to all letters. This is the courteous, agreeable, and positive tone so conducive to good business relations.

Form letters

The secretary will also find it of value to keep on file, or at hand, models of letters that he may be

called upon to write. He should first make out a letter which conforms in mechanical make-up in every detail with correct form or with the form that the employer desires to be used. ~ He should, moreover, keep models of the various ways in which the employer desires his letters to be written.

The employer may wish to have answers to invitations composed in a certain style. If he dictates one of these letters word for word to his secretary, the secretary should keep the carbon of it and use it as a model. In the future, whenever a letter of this same type comes up for answering, the secretary himself can make use of the model which has been furnished him by his employer and with a few changes in words, so that every letter will not be identical, write the answer.

By keeping a file of such model letters the secretary will find, first, that he is saving himself time in writing letters of the type called for; and second, that he is writing better letters, because letters composed on the spur of the moment or when the secretary is rushed are not so good as those carefully thought out and polished up beforehand.

Making of précis or digest

On certain occasions the employer will ask the secretary to give him a digest of the correspondence that has taken place between him and some

CORRESPONDENCE IN REGARD TO ORGANIZATION OF THE R. & K. COMPANY.

No.	Date	To	From	Subject	Remarks
1	April 4	R. M. Bangs		Charter in New York or Ohio?	Reasons wanted in detail.
2	April 5	Hudson & Yerkes		Best method of underwriting?	Type of organization explained.
3	April 6	P. S. Ammers		Calling luncheon meeting for April 10.	Discussion to be held on financing of company.
4		George Fallon		"	
5		H. R. Fox		"	
6		E. J. Moore			
7	April 7		H. R. Fox	Unable to attend luncheon.	
8	April 7		R. M. Bangs	Charter should be secured in Ohio.	Only 10% of capital need be paid in. Corporation tax less.
9	April 10	Hudson & Yerkes		In hurry for answer to letter of April 5.	
10	April 12		Hudson & Yerkes	Underwriting R & K Company.	Mr. Yerkes will call on April 14 to discuss situation.

DIGEST OF CORRESPONDENCE

other man or firm, or which concerns a certain matter. When the secretary is thus called upon, he should make out the *précis* or digest according to an arrangement like that given on page 85. This form should contain the number of the letter in its series, the date of the letter, the correspondent, the subject matter, and remarks.

In digests of correspondence or of transactions carried on in ways other than by letter (digests are sometimes called for of transactions other than those handled by letter), the secretary should strive to put into as concise a form as possible both the subject matter under discussion and the remarks on how the matter was handled.

Another form of digest or history of a correspondence is where the various facts are related in a story or ~~narrative form~~. This story should be short, connected, and should contain only the leading points.

111
82.
24

CHAPTER IV

POINTS ON LETTER WRITING

"FRANK," called Mr. Forbes from the doorway of his private office, "bring in the carbon copies of the letters you dictated this morning."

Frank Campbell, Mr. Forbes' private secretary, immediately went to his stenographer, who took from her basket the copies as yet unfiled and handed them to him.

"I wonder what he wants with them," thought Frank as he walked into his chief's office. There he found Mr. Forbes, the president of the Forbes Steel Company, seated at his desk and awaiting him. Frank handed the carbons to him with the remark, "Here are all the carbon copies of this morning's dictation."

"I've been thinking that I could give you a helpful idea or two about your letters," remarked Mr. Forbes as he motioned his secretary to a chair. "You have been with me only two weeks now, but you have got into the swing pretty well."

Here there was a pause while Mr. Forbes carefully read through the carbon copies.

"There is just one criticism I want to make of

your letters," said Mr. Forbes. "Just look at the beginning of this letter."

The letter began as follows:

Dear Sir:

Yours of the 15th instant just to hand and in reply beg leave to say that Mr. Forbes will be glad to take up this matter with you if you will call at his office at 11:30 on Wednesday . . .

"Why do you begin your letters in that hackneyed way?" questioned the chief.

"Because most of the letters we receive begin in that way, I suppose," answered the secretary.

"Just so," said the chief. "You imitated what you probably think is the correct way to begin a business letter. That makes your own letters commonplace. Now, run through these other letters. In nearly every case you begin in about the same way. How much impression do you think your letters will make if they are written like all other letters? Not much, will they? You should make your letters different, individual. Don't use these old, stereotyped beginnings and endings. They are not only useless; they make your letters commonplace. When you are dictating, keep away from those meaningless phrases that you find in business letters.

"And another point, Frank," went on Mr. Forbes. "You and I — in fact, the whole concern

— are judged by the letters that leave the office. Never send out a letter that you fear may create a poor impression. ✓ Critically judge every letter before you sign it. If it is n't up to our standard, dictate it again.

“If you want to learn our standards,” continued the chief, “get some of my letters from the files and study them. I don't claim that they're perfect, but they will give you a good idea of the kind of letters I should like to have you dictate.”

The importance of the subject

The writing of letters is probably the most common duty of secretaries. Since a good part of the success of the secretary rests upon his proficiency in it, he should give much attention to the art.

The employer may be an excellent letter writer, but he seldom has time to dictate word for word each letter that leaves the office. He is compelled to depend upon the secretary to see that the letters which go out are up to his own standard. If he finds that letter writing is a weak point of the secretary, he must either do a large amount of the work himself or get a new secretary.

Business English is used

As most private secretaries are secretaries to business or professional men, it will be found that the

type of English of most value to them in letter writing differs from the type used by the social secretary, for the letters written are usually, although not always, on business matters. The social secretary's letters are written in more or less literary English and in a conventional style. The English used by the private secretary in business is not literary English but Business English.

Business English composition has been defined as the art of employing written English to arouse in others such feelings as shall cause action that results in business profit, and to do so with the least waste of time, effort, and money. It includes all written messages used in commercial transactions for the purpose of securing a favorable response for the writer by impressing the reader.

Business English is not a separate language in the sense of being composed of words and phrases peculiar to business transactions. The secretary or writer who mechanically uses such stock expressions as "Yours of the 15th instant to hand," "Pursuant to yours of even date," and so on, is not necessarily a writer of good Business English. These stereotyped expressions are not so efficient as simple expressions that mean the same thing; they injure rather than aid. They are weak because they are so common. Certainly the average man never

speaks them. They destroy the personality of the letter.

Like any other branch of English composition, Business English involves two processes, *right thinking* and *right technic*. The writer must think clearly, know the solution of his business problem, and express and impress his ideas precisely. Business English has to do not merely with composition, but also with the motives which induce people to act. In other words, the writer must comprehend the whole psychological problem involved in any given case, and must make use of his knowledge in the expression of his thoughts.

Impression versus expression

The main difference between literary composition and Business English is the purpose. In most forms of literary composition the writer endeavors to express his thoughts with clearness and precision for the purpose of giving information or entertaining the reader; in Business English, however, the purpose is profit. Since Business English must produce a profit, it must not merely please or instruct the reader; it must cause him to act—it must make him respond. The test, therefore, that the secretary should apply to the business letter is this: “Does it make the reader do what the writer

wishes him to do?" "Does it bring the response the writer desires it to bring?"

In literary composition the writer usually considers only the expression of his ideas; in Business English the writer must consider not only the expression of his ideas but also the impression upon the mind of the reader. He must make such an impression upon the reader's mind as shall arouse him to the desired course of action. This impression can be secured only by conveying the writer's own idea to the reader in such a way that the latter shall accept the former's point of view.

Business men are not purists; they do not always demand nicety in language. It is not always necessary that polished diction and well-rounded sentences be used. Nor is it fatal if a business message should violate a rule or a convention now and then. Contractions, slang, colloquialisms are allowed in many cases and at times are more effective than pure English would be. All this is so, because the important and, for that matter, the only real purpose of a business communication is the transmission and impression of a message. If the reader understands the message just as the writer wishes it understood and acts just as the writer wishes him to act, there certainly can be no cause for complaint. At the same time it can never be certain

that the message will be fully understood unless the expression is clear, the punctuation correct, and the choice of words accurate. Hence it is necessary that certain rules of form be observed, for they will aid in getting the right result.

The "You" attitude

The "You" attitude means that the words, *I, we, my, mine, ours*, and so on, are subordinated as much as possible. It means that the writer shall have a sincere regard for the reader and shall take his viewpoint. No other appeal is so direct, so effective as that which is summed up in the words *you, your business, your welfare, your interests*. The secretary should keep before the reader his interests, not his own. He should look at the problem through the eyes of the reader. He should remember that in the consideration of the three factors involved in a message (the sender, the subject or idea, and the reader), the third, the reader, is the most important.

The weakness of most letters is due not to ungrammatical sentences or to poor style, but to the wrong viewpoint that the writer takes. To overcome this weakness, two things will help: first, the writer should know how to solve the business problem involved in the letter; second, the writer should keep the reader in mind.

Adaptation to the reader

In order that the secretary may make the desired impression upon the reader's mind, through his business letters, it is essential that some adjustment should be made if the message is to be conveyed. Accordingly, Business English composition should be adapted to the reader in language, mood, character, and substance. By this is meant that the language used in the letter must be such as the reader would use or understand, and such as is best suited for the occasion; that the mood or tone must be such as will make the best appeal to the reader and will best aid the secretary in getting him to do what the writer wants; that the character or personality of the letter must be of the kind to make the deepest impression on the reader; and that the arguments used must be those that appeal to the reader.

The adaptation in language consists, first, in the use of such words, sentences, and paragraphs as are surely within the comprehension of the reader. In answering a letter written on a mere scrap of paper and showing the illiteracy of the correspondent, the secretary should use simple words, sentences, and paragraphs. Adaptation in language also means that the language used should be well suited to the direct purpose of the letter. Again, since the purpose of certain letters is to incite action, the words,

sentences, and paragraphs of such letters should be short, sharp, and incisive. If, on the other hand, the secretary is answering a letter of complaint written by an angry man, he should use the kind of language which would tend, from its mere type, to soothe and allay the anger of the complainant. He would use long, smooth sentences and paragraphs, for they tend to soothe.

Adaptation in mood means that the secretary should adapt himself to the mood of the reader. If the secretary is adjusting some difference, he should put himself into a friendly, sincere, and sympathetic attitude before he commits his thoughts to paper. If the reader is antagonistic, the secretary must be tactful and diplomatic. One object of the secretary in handling such letters is to create a coöperative and sympathetic state of mind and not to stir up opposition or resentment.

Adaptation to the character or personality of the reader means that the language and tone of the composition must not clash with the known characteristics of the prospective reader of the letter. In most cases the secretary is able to learn of the character of the reader from his letter. He may know it from acquaintance with him, from his business position, his nationality, credit rating, or from many other factors. If the secretary finds by analysis that the reader is conservative in character, he should adapt

the tone of his letter to the character of the reader and make the character or tone of his letter conservative by expressing his ideas in non-colloquial, formal, and dignified language. If the secretary finds by analysis, however, that the reader is progressive, live, and up-to-date, a short, brisk appeal will be more likely to make a good impression. In certain cases, the character of the employer or his business will govern the character or tone of the letter. For example, letters sent out from firms like banking and bond houses should be dignified and conservative.

Adaptation or adjustment in substance means that from the ideas at the disposal of the secretary, those should be selected and used that are closest to the reader's experience and interests. The secretary should sufficiently understand the reader to know that of all the arguments, appeals, and ideas that may be used, certain ones will most directly reach the reader. The secretary, therefore, should direct his persuasion at the interests that govern the reader and so fit his appeals to these specific interests.

Fundamental qualities in Business English

A careful examination of the correspondence, business reports, and other forms of composition, sent out by the best business houses, has revealed

the fact that certain qualities are common to all forms of good Business English. These qualities are five in number : clearness, courtesy, conciseness, correctness, and character.

Of all these qualities or characteristics of Business English, with the possible exception of the quality of correctness, the reader and not the writer is the judge. This fact can be easily understood from an explanation of the matter of clearness. In many cases the secretary thinks that his letter is clear ; but yet the reader is unable to understand it. It is not what the secretary thinks about his message that counts so much as what the reader thinks. Letters that the secretary intended to be courteous may appear discourteous to the reader.

The quality of clearness

The first quality of importance in a business composition is that of clearness, for the purpose of the composition is to convey a certain message to the reader. Business men realize the importance of clearness ; they have had it brought home to them so often in matters of disagreements and misunderstandings. It is obvious that, if a business composition is not clear and does not convey its idea to the reader on the first honest reading, it is likely to be a financial loss, for few readers will take the time to study out what the writer had in mind when he

wrote it. Clearness is obtained by clear thinking and by simple and precise expression.

A composition is said to have the quality of clearness when the ideas are so expressed that the ordinary reader need exert little mental effort to understand them and cannot misunderstand them. Clearness, in other words, recognizes the law of economizing the reader's attention. Herbert Spencer's idea of this law may be expressed as follows: Every one at a given moment has a certain amount of power of attention. Accordingly, whatever part of this power is used upon the form of the message must be deducted from the total; the remainder is left to comprehend the message itself. Those word combinations therefore are best which require the least energy for the comprehension of their meaning.

The quality of clearness is violated in three common ways: by ambiguity, by vagueness, and by obscurity.

Ambiguity means that a statement admits of more than one meaning. As a result of this double meaning the reader is very likely to take a wrong understanding of the idea. The writer should take care that his statements can be understood in but one way. He should first think clearly and then write precisely.

Vagueness means that the statement is not definite in meaning. Although not meaningless, it is

likely not to convey much meaning. The reader gets a meaning, but it is not the writer's entire and exact meaning. Circumstances determine vagueness to a great extent. For example, if in answer to a letter that asks what time an appointment can be made the following is sent, it would be said to be vague: "I think that perhaps I may be able to make the appointment with you very soon." Vagueness is caused by the use of inexact and un-specific words and expressions. This fault may be avoided by making the thought exact and specific, and by using exact and specific words to express it.

Obscurity means that a statement is not readily understood, although by careful re-reading and study the reader may finally understand what the writer intended to say. Few compositions in Business English, however, are usually considered important enough for a second reading. In fact, many readers have neither the time nor the disposition to re-read a message.

Clearness, therefore, exists if the combination of words used to express the thought carries to the reader definitely and unmistakably the thought of the writer. Clearness is secured by constantly working for it. The writer should ask himself, "Just what do I mean?" "Do these words say exactly what I mean?" "Do they say anything I

do not mean?" The secretary should be critical of his own work.

The quality of courtesy

Courtesy means that the writer should have a due regard for the point of view of the reader. The writer must acquire the ability to put himself in the reader's place and to view his own letter through the reader's eyes. Curtness, snappishness, and impoliteness should be avoided. The "You" attitude should be used. The writer should be courteous and show that he has a sincere regard for his reader.

Discourteous:

Dear Sir:

I have not heard from you in regard to my last letter. What's the matter with you anyway? Don't you think I am in a hurry for an answer?

Very truly yours,

Better:

Dear Sir:

I have as yet received no word from you in regard to my letter of January 24. Won't you kindly look up the matter and let me know about it as soon as possible?

Very truly yours,

Curtness is a milder form of discourtesy, but it is harmful to good business. It is usually brought

about unconsciously by the reader's striving for conciseness of expression. Examples:

Dear Sir:

Yours of the 15th to hand. I cannot answer it to-day.

Yours, etc.

In this particular example the discourtesy can be changed to courtesy by a more adequate consideration of the letter and by the use of several polite phrases.

Dear Sir:

In reply to your letter of January 15 in regard to renewing the lease for 83 Western Street, I am sorry to inform you that Mr. Ackers is out of town. I shall be glad to let you know of his decision upon his return.

Yours truly,

Letters to women — who for the most part are unused to the short, snappy letters of business — should be carefully watched for the fault of curt-ness. Women very easily take offense at any abruptness in tone.

Courtesy does not, as many consider it, consist only of polite terms and phrases. Many a letter that has polite phrases scattered throughout is discourteous. Politeness is merely a veneer. Courtesy goes deeper. It is a sincere regard for the other man — the reader. Formal phrases of politeness can in no way take the place of true courtesy. In-

deed, such an expression as "Thanking you in advance" is actually discourteous, as it discounts the value of the favor asked. "Dictated but not signed" also savors of discourtesy. Do not use such expressions.

A violation of courtesy may arise from the discourteous treatment given to a letter. The secretary should not, for example, scribble the answer on the original letter and mail it back. It suggests that he considered the letter so unimportant that he did n't care to keep it. Such an act is likely to be resented.

The quality of conciseness

The quality of conciseness is a good example of the fact that the reader is the judge of the qualities that a letter possesses and that all qualities are relative. A letter that is considered concise by the business man might be considered curt by a woman. True conciseness in Business English is a matter of adaptation to the reader. This much about conciseness is certain: the thoughts and ideas of the writer should be expressed in as few words as will convey the message unmistakably to the reader. Words that do not help to carry the message merely serve to clog the thought. Conciseness means that the ideas are expressed briefly, but still with grammatical completeness.



Two common faults arise from the attempt to secure conciseness: (1) grammatical incompleteness of sentences, and (2) curtness or snappishness in tone. Grammatical incompleteness arises if the writer, in a mistaken attempt to secure brevity of expression, omits the subject of the sentence, a part of the verb, or some other important element that is needed to complete the grammatical construction of the sentence. Such omissions cause ambiguity, obscurity, and hence, instead of hastening the comprehension of the thought, impede it. In telegrams, cablegrams, and the like, the message is expressed in the fewest words compatible with clearness. Grammatical completeness may be prevented by cost.

**Example: SHIP FAST FREIGHT THIRTY
NUMBER EIGHTEEN BOATS
FIVE MODEL ENGINES.**

The other fault brought about by a mistaken idea of conciseness is that of curtness or snappishness of tone. The message is expressed in as few words as possible to convey the message, but in certain cases the reader receives a disagreeable impression from its tone.

The quality of correctness

The quality of correctness is present if the me-

chanical form of the composition is in accord with the rules of mechanical make-up, if the language is in accord with the usage of good modern writers, and if the technic — the execution of the composition — is correct from the business point of view.

At the first meeting, a man is judged by his personal appearance — his clothes, his looks, and so on — and by his speech. Many of these snap judgments based on a man's appearance have been erroneous — but it takes much to change a first impression — especially if that first impression be a poor one. So it is that the person or concern presenting a business message to one reader or a hundred thousand readers cannot afford to allow the mechanical make-up — the dress — of the message to make a poor impression. The appearance of the composition must be good. Correct dress commands a certain amount of respect and attention.

The mechanical make-up deals with externals; that is, the margins, the typing, the placing of the matter on the page, and so on — whether it be a letter, report, or other form of business composition. Correctness of the dress of a letter is a matter determined by usage — present-day usage. Because of its long and constant use, the letter has become more or less conventionalized as to form, but certain parts of the letter have changed. The slid-

ing-off, participial ending of sixty years ago was as follows:

Assuring you of our great pleasure in having been given this opportunity to serve you, allow us to subscribe ourselves as

Your faithful and humble servants,

John Jones & Company.

Such a complimentary close would now be judged incorrect because of its not being in conformity with the present-day custom of the best business houses. To be in correct mechanical make-up, the letter must conform with present-day usage. What this usage is and by whom it is decided, are questions that naturally arise. Usage, it may be said, is the practice of the majority of the best authorities. Usage, however, like fashion, is constantly changing. What was correct yesterday may not be correct to-day; what is correct to-day may not be correct to-morrow. Not many years ago the script letterhead was in vogue; nowadays simple Roman type is preferred.

A man is judged by his speech. If that be crude and ungrammatical the speaker stands condemned. Faults in speech are by no means so glaring as faults in writing, for in the latter case faults are in a lasting form so that all may see and laugh. The secretary cannot afford to be misjudged — he cannot afford to send out letters that have errors in

grammar, punctuation, or spelling. If he does send out such letters, he lowers himself and his employer in the estimation of the men with whom he deals. Bad grammar, therefore, is wrong from the business standpoint not so much because it is liable to render the message obscure, as because it lowers the user in the eyes of the reader, and this means loss in business results.

Correct grammar passes unnoticed, as it should, for it is expected. Bad grammar, since it attracts attention to itself, distracts the reader from the message and gives him an unfavorable impression both of the writer and of the proposition. Correctness in language is a matter of usage — the practice of the majority of the best writers.

The mechanical make-up and the language are external matters. The execution of the composition deals with internals. Correctness in executing a letter or advertisement is a matter that concerns the correct solution of the business problem involved (this, of course, involves the use of correct facts and ideas); in other words, correctness of execution is a matter of internals — of the ideas that are used. A business composition is correct in execution, therefore, if it conforms in construction with the technic that has been found to be the best for results and if it is accurate in its ideas and facts.

The quality of character

In importance second only to the quality of clearness is the quality of character, which is far rarer than clearness. Character means that the composition is distinctive either because of the writer's personality or because of a certain tone, style, or quality which the secretary consciously or unconsciously puts into his composition. Since a large majority of business compositions are characterless, the composition that has character secures more than ordinary attention. The secretary imparts his character to the writing as much as he impresses his personality on the person with whom he talks. In reading a letter that has character, the reader feels as if he were listening to the real talk of a real personality and not to the mechanical jargon of a mechanical correspondent. Many business compositions have the four other qualities, but few have the quality of character. Hence, the composition that has character stands out over all other compositions and commands, receives, and holds the reader's interest. This distinctiveness results in the securing of a favorable impression of both the message and the writer. The quality of character is an essential of effective business compositions.

Character, however, does not mean eccentricity or oddity in expression. It is not to be secured by

posing. Rather is it the personality of the secretary injected into his writing and adapted to the reader. Such a writer expresses his idea not by means of mechanical expressions but by means of individual expressions.

If the secretary wants to secure character for his compositions he must first break away from the habit of using the worn-out phrases that are common in commercial correspondence. His next step should be to express his ideas and thoughts in a natural way — simple, direct, and exact. He should write just as he thinks.

Business English style

In literary circles the conception of style is that it is the individuality of the writer as shown in his expression. Buffon's famous definition "*le style est de l'homme même*" (style is of the man himself) is the accepted one generally. This definition, however, is inadequate for the writer of Business English, for it takes into account merely the writer, only one element of the three that affect every piece of composition — the writer, the subject, and the reader. Style, in Business English, does not mean simply the expression of the writer's individuality. By far a better definition for style in Business English is: *Style is the writer in the right relation to his subject and his reader.* The message must be

suiting to the reader, the subject, and the standing of the writer or business house. Of these three, the reader is usually the most important.

The writer of Business English should forget about his personal style, about himself, and should think of the reader that he is desirous of reaching. He should find the ideas that will appeal to him, the language that he can understand, and the action that he can be induced to take. Business English style, therefore, must be suited to the reader. The reader must be made to read, understand, and to react. In addition it should be suited to the subject. The less style in the sense of literary style that the secretary has the better. Certainly he should have no mannerisms. He should have sufficient versatility and adaptability to suit his message to the reader, the subject, and the employer — and forget himself.

The qualities of a good Business English style, considered above under the names of Clearness, Correctness, Courtesy, Conciseness, and Character, may be grouped under two heads — distinctiveness or force, and economy.

1. Distinctiveness is necessary in order that the message may stand out from other messages and impress the reader with its individuality.

2. Economy is necessary in order that the message may hold the reader's attention throughout. The message should be so written that as little men-

tal strain as possible is put upon the reader. Economy of attention is secured if the message is clear, concise, and correct.

How to learn to write Business English

Good business writing is simply the encouragement of right habits — the fixing of good habits until they become a part of one's nature and are exercised automatically. Four points, therefore, should be remembered in learning how to write Business English :

- I — The composition is judged by results; not by critical standards of form.
- II — The message is conveyed to the reader only if you have him in mind and sincerely adapt yourself to him.
- III — Learn the qualities that successful letters have and know how to obtain them.
- IV — *Practice and Experience.*

CHAPTER V

THE MECHANICAL MAKE-UP OF THE LETTER

IN answer to the soft warning of the buzzer, Frank Campbell ceased his dictating to his stenographer and with the remark, "I'll be back in a moment, Miss Ray," hastened into his chief's private office.

Mr. Forbes was just finishing the signing of his letters and looked up with a pleased expression.

"I did n't notice that we had a new stenographer. She does good work," remarked the president of the Forbes Steel Company.

"Why, we have n't a new stenographer," said Campbell rather puzzled.

"Well, who typed these letters?" questioned Mr. Forbes. "They appear to be typed in a different style from ordinary. And I think they show a big improvement in appearance. How was it done?"

"Miss Ray typed them, but I must admit the soft impeachment as to having changed the style of make-up," answered Campbell. "I have been on the lookout for good-looking letters. I have also

consulted several books at the Library on business letters. Finally, I decided to make a change in the mechanical make-up of our letters. I showed Miss Ray what I wanted and after several trials we fixed our standard form for all letters that go from this office. I had copies of this standard form made and given to the stenographers."

"That's good," said Mr. Forbes. "If there is anything I believe in, it is good-looking letters.

"And is n't this a new letterhead?" he added as he carefully examined the letter sheet.

"Yes," answered the private secretary. "By the time the supply of letterheads gave out, I had formed in my mind certain ideas of what our letterhead ought to look like and so I just went ahead and had this new one engraved. I hope you like it."

"I do," said Mr. Forbes. "In fact, I think that the letters as a whole show a marked improvement. I congratulate you."

A standard of form should be adopted

There are two reasons why the private secretary should know the correct mechanical make-up of the letter: first, he himself may be called upon to write letters, in which case he must know the correct forms used in letter-writing; and, second, if he has stenographers, he must be able to criticize their work.

Before any letters are sent out at the beginning of his service, he should examine previous letters to discover what has been the office standard in regard to make-up. This form he should use until he is ready to adopt and put into effect a better form. As soon, however, as he has decided upon the mechanical form to be used, he should make copies of it so that both he and the stenographers may have some standard to go by.

The desirability of having all letters that leave the office conform to certain rules of appearance is readily recognized. If letters are handled by three or four different correspondents and typists, there are likely to be three or four different styles in the make-up of letters going out from the office. Such a state of affairs is by no means satisfactory. By adopting a uniform policy in regard to the make-up of a letter and by impressing upon the various typists the fact that these rules should be followed so that the mechanical arrangement of a letter may be always the same, the secretary will secure a definite, standardized form of letter.

It is wise, therefore, for the secretary to devise a manual of the rules that are to cover the mechanical make-up of the letter in its various forms. The following pages on the mechanical make-up of the letter cover the most important usages of the business offices of the present day. The secretary can

choose those rules which he desires to make use of. These rules can then be typed out and a copy given to each correspondent and typist.

The outward appearance of the letter

The outward appearance of a letter makes the first impression on the reader. It is important, therefore, that the letter shall present as good an appearance as possible in all the externals that catch the reader's eye, such as arrangement, typing (or handwriting), paper, and so on. These externals are called the mechanical make-up of a letter.

In many cases the style and make-up of a business letter are often all that the reader has to guide him as to the standing of the firm or person with whom he is dealing. The slovenly, careless-looking letter makes a poor impression. The letter that is correct in mechanical make-up inclines the reader to be favorably disposed to the message; at least no unfavorable impression is made which must be overcome by the message.

A part of the first impression made on the reader is produced by the paper upon which the message is written. Good paper stock is worth a high price, not because it pleases the concern or the employer, but because it influences to some degree the man to whom the letter is sent. The kind of paper chosen,

The New York, New Haven and Hartford Railroad Company.

I

PRESIDENT'S OFFICE

New Haven, Conn.

**W. G. MYADOD
80 CHURCH STREET**

*Fifth Avenue
St. Paul 35th Street
New York.*

**34 WALL STREET
NEW YORK**

**NEW YORK UNIVERSITY
SCHOOL OF COMMERCE
ACCOUNTS AND FINANCE**

**DEPARTMENT OF ENGLISH
EDWARD JAMES WILSON**

**WASHINGTON SQUARE
NEW YORK CITY**

**JOHN HAYS HANCOCK
TREASURER
NEW YORK**

as to size, color, and quality, depends upon certain points.

In the first place, it depends upon the person or class of persons to whom the letter is sent, for in every case should paper be selected which will meet the expectations of the reader in regard to the man from whom it comes. What the employer thinks about his stationery is not so important as what the recipients think. In the second place, the kind of paper used depends upon the nature and the standing of the business and upon the type of position held by the employer. It certainly would be a grievous mistake if the letters coming from the office of a president of a large bank were written on poor, cheap paper. For ordinary *business* correspondence the paper used is a sheet $8\frac{1}{2} \times 11$ inches, to fit the standard envelope $6\frac{5}{8} \times 3\frac{5}{8}$ inches. The paper should be unruled and preferably white or of some light tint. Bond papers are extensively used. Half sheets should not be used, for the saving in cost does not compensate for the impression of parsimony that is made on the reader of the letter.

The printed heading

The *business* letterhead gives the name of the employer or his firm, the address, sometimes the nature of the business, and it may also contain the

Mail Order Advertising Service
 29 East Broadway Street, New York City
 Telephone: Western Murray HdB 222 and 223

PHOENIX LIFE INSURANCE COMPANY
 INCORPORATED IN ILLINOIS
 CAPITAL & RESERVE \$1,000,000



PHOENIX MUTUAL LIFE INSURANCE COMPANY
 INCORPORATED IN ILLINOIS
 CAPITAL & RESERVE \$1,000,000

PHOENIX MUTUAL LIFE INSURANCE COMPANY
 HARTFORD, CONN.



AMERICAN WRITING PAPER CO.
 HOLYOKE, MASS.

DEPARTMENT OF ADVERTISING

THE SAUWS PRODUCTS COMPANY
 80 CHURCH STREET NEW YORK

NEW YORK UNIVERSITY
 SCHOOL OF COMMERCE
 ACCOUNTS AND FINANCE

**NEW YORK UNIVERSITY
 SCHOOL OF COMMERCE
 ACCOUNTS AND FINANCE**
 DAY AND EVENING SESSIONS

NEW YORK CITY

THE NEW YORK EDISON COMPANY
 FIFTY FIVE DUANE STREET

THE VOGUE COMPANY

Special Type

New York City

Special Type



AMERICAN HOMES & GARDENS

MUNN & CO.
 Editors and Publishers
 341 Broadway, New York



BUSINESS LETTERHEADS

telephone number and other essential information. Seldom should it contain such unessential facts as pictures of the products or of the buildings of the firm and long lists of directors, for the heading is not the essential part of the letter — the typed matter is. The simpler the letterhead, the better chance has the message in the body of the letter to secure the undivided attention of the reader. Nor should the printed heading occupy more than one fifth of the sheet. It should not extend down the margins for advertising purposes. As a general rule, it may be said that letterheads printed in script are not in harmony with the typewritten letter.

The letterhead may be lithographed, engraved, or printed. The color should usually be black. Other colors are sometimes effectively used, but black ink on white paper is the safe and correct form. One style of type in the heading is much preferred to an assortment of styles of type. A rectangular shape of printed heading is in harmony with the shape of the letter sheet.

The written heading

When the heading is *written by hand*, it is placed at the top of the letter sheet, close to the right-hand margin. It contains the street address, city address, state address, and also the date. The example below will illustrate:

18 Prospect Street,
Hartford, Conn.,
August 15, 1915.

It is a practice of some to omit punctuation at the ends of the several lines of the written heading. In fact, it is coming into common usage.

It is better never to abbreviate the name of the State when the abbreviation is likely to be confused with the abbreviation of another State. Instead of writing *St. Joseph, Mo.*, the secretary should write *St. Joseph, Missouri*, for *Mo.* might easily be mistaken for *Me.* (*Maine*). *Ga.* (*Georgia*) could easily be read as *Pa.* (*Pennsylvania*). This fact is especially true of letters in handwriting.

No word or sign should be placed before the street number. In *#45 West Ninth Street*, the sign before the number should be omitted and in *No. 45 West Ninth Street*, the *No.*, for number, should also be omitted.

The date should consist of the month, the number of the day, and the number of the year. Do not use a number for the month and do not abbreviate the year. Instead of writing *8-9-'15* or *8/9/'15*, the secretary should write *August 9, 1915*. Although at first glance, the use of the number of the month and the abbreviated number of the year seems to be more efficient than the use of the

month written out, nevertheless the reader is often confused and loses time in trying to find out exactly what month is meant. In some European countries 8-9-'15 would be read: *September 8, 1915*. The number of the day should not be followed by *nd*, *rd*, *st*, or *th*. In other words, do not write *August 8th*; write *August 8*. When reference is made in the body of the letter to a date, either form is correct. In ordinary business letters the numbers and the date should not be written out in full, as *December nineteen*, *Nineteen hundred and fifteen*. In certain cases, however, as in *official* letters, the date is spelled out to secure greater formality or to secure a better appearance for the letter.

The entire heading, even though it be short, should not be written on one line. It is better to use three lines with the date on a separate line.

The inside address

The name and address of the person to whom the letter on a business matter is directed is placed at the left-hand side of the letter sheet below the heading, and about one inch from the edge of the sheet. Its distance below the heading depends upon the amount of typed matter that is to go upon the sheet and also upon the method of arranging that matter. Two forms are used; the straight edge, or the slanting-in (*encelon*) form, as follows:

Mr. George L. Scott,
415 Wabash Avenue,
Chicago, Ill.

or

Mr. George L. Scott,
415 Wabash Avenue;
Chicago, Ill.

The inside address contains the name of the person or of the firm and the address. The address consists of the street and number, and the city and the State. In certain cases the State is not needed and may be omitted. Indeed, in some cases the street address need not be given, but the best usage is to include it. Punctuation may or may not be placed at the ends of the various lines of the inside address.

Courtesy and conformity with custom demand that some title precede the name of the person or firm. Among the commonest titles are *Mr.*, *Mrs.*, *Miss*, *Messrs.*, *Dr.*, *Honorable*, *Reverend*, *Professor*. The title *Esq.* (*Esquire*) follows the name of a man. In the United States, however, the use of this title is rapidly going out of custom. When it is used, the title *Mr.* should be omitted. Do not write *Mr. Harry L. Morgan, Esq.*, but *Harry L. Morgan, Esq.*, or *Mr. Harry L. Morgan*. The latter form is preferable.

The title *Miss* is not considered an abbreviated form and is therefore not followed by a period. The title *Messrs.* is an abbreviation of *Messieurs*. A common error is to write *Messers.* or *Mess.* It should be noted that *Messrs.* is used as a title in addressing two or more persons engaged in business under a firm title, but is not used when addressing under an impersonal corporation title; i. e., the partnership of *Lewis and Hyde* should be addressed *Messrs. Lewis and Hyde*, or *Lewis & Hyde*, but the *United States Steel Corporation* should not be addressed *Messrs. United States Steel Corporation*, but *United States Steel Corporation*.

Such initials as *Ph.D.*, *M.A.*, etc., and titles such as *President*, *Secretary*, *Cashier*, etc., follow the name of the person addressed; as *Prof. Walter Dill Scott, Ph.D., Northwestern University*.

Salutation

The complimentary address at the beginning of a letter is called the salutation. In *business* letters it is practically limited to four forms: *Dear Sir*, *Gentlemen*, *Dear Madam*, and *Ladies* or *Mesdames*. *Dear Madam* is used in addressing a woman, whether married or unmarried. More formality is shown by the use of the salutation *My dear Sir* or *My dear Madam*. Note that the first letter of the second word is not a capital. In exceptional cases,

as in writing to government officials, the plain and highly formal *Sir* is used. If the writer is personally acquainted with the addressee or has corresponded with him before, he may use *My dear Mr. Jones* or *Dear Mr. Jones*.

The salutation should be written flush with the left-hand margin and in alignment with the first line of the address. It occupies a line by itself. Either of the following forms is correct:

Brooks Brothers,
44th Street,
New York City.

Gentlemen:

Brooks Brothers,
44th Street,
New York City.

Gentlemen:

The salutations *Dear Friend*, and *Dear Miss*, should not be used. Nor should the abbreviation *Messrs.* be used as a salutation. Do not write:

Rogers Peet Co.,
515 Broadway,
New York City.

Messrs.:

The correct form is:

Rogers Peet Co.,
515 Broadway,
New York City.

Gentlemen:

Dear Sirs has of recent years become obsolete. In the addressing of such *firms* as, for example,

THE SAVVY PRODUCTS COMPANY
80 CHURCH STREET NEW YORK

July 12, 1916.

Mr. H. G. Cannon,
1206 Williamson Building,
Cleveland, Ohio.

Dear Sir:

Because of my absence from the city, I have been unable to answer the question that you raised in your letter of June 24, about the Minute Book. I hope that this delay will not inconvenience you.

The Minute Book was sent from New York on June 22 by Adams Express. It could hardly have reached you by the time you mailed your letter. By this time you probably have received it. If, however, you have not received it, let me know and I will have it traced. I am enclosing two carbons of letters that will be of interest to you.

Yours very truly,



JHB
ENC
2 Encls.

ARRANGEMENT FOR BUSINESS LETTER
(Block Form)

THE SAVMS PRODUCTS COMPANY
50 CHURCH STREET NEW YORK

July 12, 1916.

Mr. H. C. Cannon,
1306 Williamson Building,
Cleveland, Ohio.

Dear Sir,

Because of my absence from the city, I have been unable to answer the question that you raised in your letter of June 24, about the Minute Book. I hope that this delay will not inconvenience you.

The Minute Book was sent from New York on June 22 by Adams Express. It could hardly have reached you by the time you mailed your letter. By this time you probably have received it. If, however, you have not received it, let us know and I will have it traced. I am enclosing two cartons of letters that will be of interest to you.

Yours very truly,

J. H. Cannon.

JHB
ENC
2 Encls.

ARRANGEMENT FOR BUSINESS LETTER
(Old Form)

John Wanamaker or *John Butler, Inc.*, the correct salutation is *Gentlemen*, because these names are the names of the firms and not of the individuals. Such a salutation is the correct form also if the corporation or firm is composed of men and women.

Never should a name alone be used as a salutation (except in communications between persons in the same office). Example:

Wrong: Mr. Frederick Adams:
Will you let me know . . .

Right: My dear Mr. Adams:
Will you let me know . . .

Such abbreviated forms as *D'r* (Dear), *Gents*, *S'r* (Sir), should be avoided.

The salutation is followed by a colon, or a comma; never by a semi-colon. The dash is unnecessary.

The body of the letter

Before the letter is typed or written the typist or writer should judge the amount of material that is to go on the sheet and plan for the space accordingly. The stenographer, before beginning to type, should always glance over his notes and judge the amount of space that will be required. If such a plan is followed the typed matter can be placed to best advantage on the letter sheet. The margins at the sides should be made deep, provided the

letter is short, because a short letter will occupy little space and this space should be as nearly in the center of the page as possible. The beauty or good appearance of a letter is usually secured through good wide margins and from the correct arrangement or placing of the typed matter on the letter sheet. The marginal arrangement that is most effective and most pleasing to the eye is one that has the widest margin at the bottom, the next widest at the top, and the sides next.

All paragraphs are to be indented an equal distance from the margin, say ten spaces or one inch, regardless of the length of the salutation. It is also wise to use double spacing between the paragraphs. Some firms use no indention, but begin each paragraph flush with the margin. In this case paragraphs are indicated by double or triple spacing between the paragraphs. In the illustrations on pages 124, 125, and 137 may be seen the correct forms of the typewritten letter.

If the letter is written in handwriting, the space between the paragraphs should be double that between other lines.

Complimentary close

The complimentary close follows the body of the letter. As a rule it begins in the middle of the page below the body of the letter.

The following forms are most used in business letters: *Yours truly, Truly yours, Very truly yours, Yours very truly, Yours respectfully.* Such abbreviations as *Y'rs*, or *Resp'y* should not be used in the complimentary close; nor should *Respectively* be written for *Respectfully*. *And oblige* should not be used in place of a complimentary close.

In the complimentary close only the first word should begin with a capital. The proper punctuation at the end is a comma. Such expressions as *Believe me, I beg to remain, I am, I remain*, etc., should not be used, for they are unnecessary and weaken the end.

The signature

The signature follows the complimentary close, a little below and directly in alignment with it if the block or straight edge form of letter is being used. If the *encelon* or slanting-in form is used, the signature is written below but a little to the right (see pages 124 and 125).

In letters from firms, the firm name should be typewritten and below it should come the written signature of the person directly responsible for the letter. Sometimes his signature is preceded by the word *By* and followed by his title such as *President, Secretary, Cashier*, and the like. This title is also typewritten.

On account of the illegibility of many signatures, some business houses have adopted the practice of typing the name of the writer directly under the firm's name (see page 124). Below this the writer signs his name. This assures that, in an answering letter, the writer of the first letter is correctly addressed. Unless the name of the writer appears in the printed letterhead it is best to sign the full name, not *H. Holt*, for otherwise *Harry Holt* might get the mail that *Hobart Holt* should get. Illegible signatures are the cause of many misdirected letters. The secretary should make sure that his signature can be easily and correctly read.

The signature of the writer, if a man, should not be preceded by any title such as *Mr.*, *Prof.*, or *Dr.*

A married woman signs her full name (this includes her maiden name) and places immediately below, in parentheses, her married name.

Grace Thompson Brisbane
(Mrs. George A. Brisbane)

The secretary uses the latter form in addressing her.

An unmarried woman signs her name with *Miss* in parentheses before it. A widow signs her name with *Mrs.* in parentheses before it. Examples: (Miss) Anna Burden Shaw; (Mrs.) Edith Bolling Galt.

A divorced woman is addressed with the title

Mrs., not *Miss*, even though she has resumed her maiden name. Should she retain her husband's name, her signature is composed of her own surname added to her Christian name. She would sign her letters as follows:

Dorothea Thompson Thorpe
(Mrs. Dorothea Thompson Thorpe)

In addressing her, the secretary uses the latter form.

Other points about the letter

The postscript is sometimes added to business letters. The letters *P.S.*, however, are no longer used to label it. Formerly the postscript was used to express some idea which had been forgotten up to that point. Now, whenever it is employed, it is for the purpose of emphasizing some important idea. Since it stands out as occupying a unique place in the letter, it should be used to contain an important idea and not simply the last thought of the writer.

Such expressions as *Dictated but signed in my absence*, *Dictated but not corrected after transcribed*, *Dictated but not read*, *Dictated but not signed*, etc., should not be used, for they are discourteous to the reader of the letter.

The identity of the dictator and transcriber of the message should never become obtrusive. Ex-

pressions such as *Dictated by Mr. John F. Royal to Miss White, Dictated by Mr. Jones*, etc., should be omitted. When identification is absolutely necessary it should be made by initials, such as *EJK-C*. Every mark or expression that does not help the message in the main part of the letter should remain inconspicuous, as otherwise it distracts attention from the body of the letter.

Enclosures should be indicated by the abbreviation, *Encl.*, placed next to the lower left-hand margin; e.g., *3 Encls.* (see page 124).

Only one side of the paper should be used. If more than one letter sheet is needed to contain the message, plain sheets without the letterhead but of the same size and material as the letterhead should be used. At the top of these additional sheets is placed the number of the sheet, the initials or the name of the firm or person to whom the letter is sent, and sometimes the date, as,

The Century Company 2. Jan. 8, 1916

Care should be taken that the last sheet of the letter does not contain only the complimentary close and the signature. The use of a little judgment will prevent such a fault.

In the folding of the letter, the bottom edge should be folded up until it is exactly even with the top

edge or one-half inch from the top edge, and creased; then there should be folded over from the right a little more than one-third of the letter, and creased. The remainder of the letter is folded over from the left. The free edge of the letter is thus slightly below the right-hand crease. It should be placed ✓ in the envelope with the free edge toward yourself.

The personal attention of a certain individual in a firm is secured to a matter of the firm's business by the expression, *Attention of Mr. Jones*, written in the center of the page. This may be placed just below the salutation or just above the inside address. The former position is preferable.

The envelope

In *business* correspondence the envelope is preferably of the standard size — $6\frac{5}{8} \times 3\frac{5}{8}$ inches. It should be made of the same kind of paper as that used for the letterhead. The return address of the sender should usually appear on the envelope in the upper left-hand corner. It may either be printed or written by hand. It should not be large or conspicuous, and should seldom if ever be used for advertising purposes.

The address should begin slightly below the middle of the envelope and should be well centered.

NEW YORK UNIVERSITY
SCHOOL OF COMMERCE
ACCOUNTS AND FINANCE

Mr. Walter Rylund,
Hyatt Roller Bearing Co.,
Newark, N. J.

NEW YORK UNIVERSITY
SCHOOL OF COMMERCE
ACCOUNTS AND FINANCE

Mr. Walter Rylund,
Hyatt Roller Bearing Co.,
Newark, N. J.

ARRANGEMENT ON ENVELOPE

Two forms are used just as in the inside address, as follows:

Mr. George L. Scott,
82 Broadway,
New York City.

or

Mr. George L. Scott,
82 Broadway,
New York City.

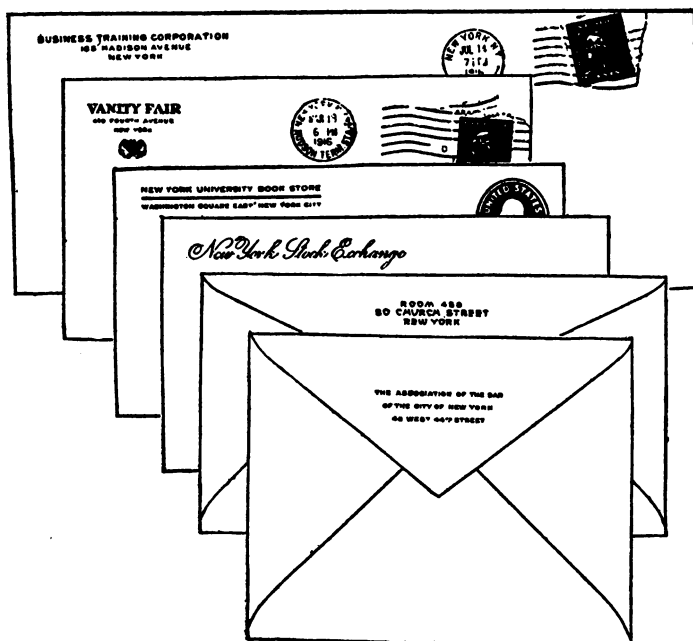
When the straight-edge form is used in the inside address, this form should also be used on the envelope. The main thing to be considered is that the address should be well balanced.

The order of the address is usually as follows: first line, name of addressee; second line, street address or box number; third line, city or town, and State or country; or the State or country may be placed on the fourth line.

The personal attention of a certain individual in a firm is secured to a matter of the firm's business by the use of such an expression as *Attention of Mr. Johns* which is placed in the lower left-hand corner of the envelope.

The envelope should have no unsightly blots, finger prints, or erasures. It is better to have the letter entirely rewritten than to take any chance of having the effect of an otherwise perfect page marred by any of these blemishes. Correctness and

neatness in a letter are of vital importance in winning a passage to favorable consideration from the reader.



ENVELOPES FOR BUSINESS USE AND FOR PERSONAL USE

Official form of letter

There is one class of letters with which the secretary should make himself well acquainted, for he will use letters of this class frequently. These letters are called "official letters." Although the name "official letters" is likely to confuse, yet the

form of letter which bears that title has been so long associated with and is in such constant use by officials that its name is firmly established. The confusion arises from the fact that the many personal letters written by the secretary for the employer are correctly written in the official form but are not "official letters" in the real sense of the name.

The name comes from the fact that the officials of the city, state, and national governments use a certain form of letter when they write on official business. (The form is now used by business executives and professional men in writing about matters that lie outside the scope of regular business.) These matters are sometimes of business value to the firm or other organization but are frequently of purely a personal matter. A letter written by one business man to another for the purpose of inviting the latter to luncheon so that the two may talk over a business matter of value to both firms would not be a business letter in the business form — but an official letter. Letters to officials and to business or professional men (on matters not purely of a business nature) belong to the same class, that is, official letters.

Official letters

Official letters, then, are used in writing about matters that are outside the scope of regular busi-

SIXTY WALL STREET

August 9, 1916.

My dear Mr. Fischer:

Your letter of August 5 reaches me just as I am leaving town for the summer. The subject which you present is certainly a most interesting one, but I am at present so overwhelmed with engagements of similar character that I must ask you to excuse me from taking an active part in the organizing of a New York Branch of the Interstate Charity League. I really cannot undertake any more than I am now carrying in the way of such service.

With sincere regards,

George R. Luce

Mr. John R. Fischer,
1154 Michigan Boulevard,
Chicago, Ill.

ness. Any letter that is written by or to an official, or to a business man on any other questions than those which come up in the *regular routine of business*, may be considered an official letter. The secretary will use this form of letter to a great extent. It is used in the personal letters of the chief to his personal and business friends — in fact it is used in all but *purely business* letters.

The stationery used in these official letters is different from that used to convey business communications. As a rule, the stationery is smaller in size, usually of folder or four-sheet form, and similar to social stationery. When the four-page folder sheet is used the fold should be at the *right*; or, in other words, that page which is ordinarily the back page of the folder is the first page to be written on. If a second page is necessary, the other outside page is used. When three or four pages are to be written on, the best order is the natural, as 1, 2, 3, 4; and not, 1, 2, 4, 3, or 1, 4, 2, 3. This order is the logical order and is the most efficient from the standpoint of typing.

A small letterhead is regularly used. This contains ordinarily only the name and address of the sender — sometimes only the address. (See examples of letterheads on page 115). The printing or engraving on this letterhead is plain, simple, and dignified.

Formal official letters

There are two classes of official letters, the formal and the informal. The formal letter is sent to government officials, members of Congress, officers of the army and navy, and others in high position, and generally to all business men except those with whom the writer is on a footing of familiarity.

The mechanical form of the formal official letter differs from that used for business letters. The inside address is written at the close of the letter at the left-hand side. In it, all titles are given in full. No abbreviations should be used.

The salutation is *Sir* or *Sirs*. The complimentary close is *Respectfully* or *Very respectfully*.

In the body of the letter, the strictest formality is observed. No abbreviations or colloquial expressions are permissible. Very frequently the third person is used throughout in speaking of the writer. The language is stately, formal, and dignified to the point of coldness.

Example:

January eight
1916

Sir:

In accordance with a resolution passed at the regular monthly meeting of the Merchants' Association of this city held on January 7, the Executive Committee on behalf of this Association hereby tenders you the hearty thanks of the

FIVE EAST SEVENTY-FIFTH STREET
NEW YORK

EDWARD H. GARY
71 BROADWAY
NEW YORK

THE WHITE HOUSE
WASHINGTON

Private Office
John Wanamaker
Philadelphia

AMERICAN MUSEUM OF NATURAL HISTORY
NEW YORK

OFFICE OF
THE PRESIDENT

Association for your efforts in improving the water freight conditions of this city. The Association as a whole has watched with appreciation the progress you have made in this matter.

Respectfully,
Executive Committee,
Merchants' Association,
By *J. F. Ackerly*, Secretary

Honorable Henry R. Thorne,
Harbor Commissioner,
Blanktown, N. Y.

Informal official letters

Informal official letters are used in writing to business men, who are on terms of familiarity with the writer, about matters outside the routine of business. The very informal, conversational tone is desirable. The informal official letter has a warm, personal tone and character, whereas the formal official letter is cold, formal, and characterless.

As in the formal official letter, the inside address is at the lower left-hand margin at the end of the letter.

The salutation is informal; as *Dear Johnston*, *Dear Mr. Johnston*, *Dear Fred*, or any other salutation the writer pleases to use. The complimentary close may be *Sincerely*, *Cordially*, or *Faithfully*, or in fact any other warm, personal ending that the writer desires to use.

January seven

1916

Dear Mr. Johnston:

Mr. Hobart has carefully read your letter of January 5 in regard to your new project and he requests me to assure you that the matter interests him deeply.

He asks me to say, however, that he is just on the eve of a trip abroad and has had neither the time nor the opportunity to give the subject the consideration which it deserves. He hopes for an opportunity to discuss this matter with you on his return and expresses his best wishes for your success.

Faithfully yours,

Condé Bylund

Secretary to Mr. Hobart

Mr. Edward F. Johnston,
15 Wall Street,
New York City.

Use of titles

In official letters all titles that are used are written out in full. The use of abbreviations is not good form. As correctness is so necessary in these letters, a brief explanation of the more common titles might well be given.

The titles *Reverend* and *Honorable* and the foreign title *Sir* should be used with the first name unless *Mr.* is included. An example of the use is as follows: *Reverend John Root, Honorable Frank Rice*. When these titles are used in the body of a letter the article *the* should precede the title, as,

The Reverend Mr. Tint will be among those present.

With a title of *Doctor* or *Professor*, the first name may or may not be used in the body of the letter, as, *Doctor Phelps*, *Professor Wildman*.

By custom certain methods of addressing officials of the Government are firmly established. The President should be addressed *The President*; a governor will be addressed as *His Excellency*, *Charles W. Whitman*; a mayor will be addressed, *Honorable John P. Mitchel*.

Judges and justices, members of Congress and of the state legislatures, are given the title *Honorable*, as *Honorable Elihu Root*.

Titles, no matter how long they may be, are written out in full, as, *Lieutenant-Governor*.

The title *Superintendent*, *Agent*, and so forth, are written after the name as *Mr. Henry Jones, Agent*. Honorary degrees, likewise, follow the name, but unlike titles, are generally abbreviated, as, *LL.D.*, *D.D.*, and so forth.

CHAPTER VI

FILING

THE door of Mr. Forbes' private office opened and Mr. Forbes came out with a letter in his hand. His private secretary, Frank Campbell, was hard at work tabulating figures for the quarterly report. Mr. Forbes walked over to Campbell's desk.

"Put this letter away some place," he said as he handed the letter to his secretary, "and bring it to my attention on May 23 — two weeks from to-day."

"Yes, sir," said Campbell as he took the letter and casually placed it among other letters in his lower right-hand desk drawer.

Mr. Forbes noted this seemingly careless disposition of the letter, hesitated, and then said: "That's a rather important matter. You are sure it won't slip your mind?"

"No, sir," answered Campbell. Then reading the anxious expression on his chief's face, he hastened to reassure him.

"You see," went on Campbell, sliding out the lower drawer, "this is where I keep my follow-up file. When you handed me the letter and said you wanted to have it brought to your attention on May

23, I just slipped it into this folder marked 23, in back of this guide card marked *May*. Every day I take out the folder marked with the date of the day and handle all the matters in that folder."

"That's a good idea," was the enthusiastic remark of the chief. "Fix up a file like that for my desk when you get a chance."

Necessity of knowing filing

Even though the secretary may not do the actual filing of letters and other papers in the office of his chief, yet he should be nearly as well informed about filing as the file clerk himself. He must have this knowledge, for he will need to go to the general files to secure certain papers. To find them he must know how the filing system works. Also, he will give directions, even though he does not file letters himself, as to how certain letters are to be filed. As the secretary, moreover, usually has the supervision of the office of his chief, he must have the requisite knowledge of filing so that he can install an efficient system of filing and so that he can be responsible for the filing.

Another reason why the secretary should know filing is that he may personally be called upon to keep a file of newspaper clippings or other data of interest or information. He may find that a "tickler" file or a follow-up file is necessary for the sat-

isfactory performance of his duties. In such cases as these, a general knowledge of the rudiments of filing will be of great benefit.

It is important, of course, to keep letters that have been sent to the office, for they serve as memoranda or records of past transactions, and are valuable for reference purposes when occasion demands. Likewise, it is important to keep carbon duplicates of letters which were sent in answer. *Filing, it might be said, is simply the storing away of correspondence, copies of replies, or information, in such an orderly way and according to such a system that any letter or piece of information can be quickly and easily found.* One prime essential of filing is that it shall bring together in one place within the files, all papers from, to, or about one correspondent or subject; that it shall keep together the things that belong together.

But the actual keeping of such letters or information is of no avail unless there is some system — unless the desired letter or fact can be found when it is wanted. Some correspondence files are graveyards for letters, because a letter once put in these files is as good as buried.

First, then, it is necessary that letters be placed in the files according to some definite and well-understood plan. This plan must be *fully* understood and should be simple enough so that some one be-

sides the file clerk can find things. The system is of little avail unless the persons who go to the file can manage it. Whatever system is used must be carefully and consistently followed out.

Qualities of a filing system

The five important qualities of a filing system are these: quickness of reference, accuracy, elasticity, economy in space and cost, and suitableness.

The first qualification that a system should have is a provision for easy and speedy production of the desired letter or information from the files. This is the quality which a filing system has if the thing looked for can be quickly found. A filing system is next to useless if ten or fifteen minutes are taken to find a certain letter.

The second qualification is accuracy. By this is meant the quality a filing system has if the chances of misfiling are small. If the secretary is forced to go over every letter in the entire file in order to find a letter that has been filed in the wrong place, he will realize the value of having a filing system which is nearly fool proof in regard to incorrect placing of letters. The system must be simple and nearly mechanical in operation so that there can be little chance for a letter to go astray.

The quality of elasticity is the third qualification of a good filing system. This is the quality a sys-

tem has if it and its various sections can be easily expanded to take care of an increase in the number of letters filed. The system used should be such that it can easily be expanded without much expense or delay in time.

The fourth qualification of a good filing system is economy. The system has this qualification if its mechanical operation is economical; i.e., if the cost of filing is small in proportion to the number of letters filed. If several well-paid file clerks are needed to take charge of a small system because there are mechanical defects in that system, such a system is not economical. This quality of economy also includes the matter of the cost of transferring letters. Every so often, say once every six months or every year, letters that are six months or a year old are removed from the files. If much time and labor is used to transfer this old material, the system is said to be uneconomical. Moreover, a third factor enters into the economy of a filing system and that third factor is the matter of space taken up by filing cabinets. If a bulky system is used, it means that much valuable space is wasted. The system should be compact.

The fifth qualification of the filing system is its suitability. The system has this qualification if it is suited to the peculiar and individual needs of the business, or if it is suited to serve the purpose for

which it is intended. Ready-made filing systems are usually not satisfactory just as they come. Since all systems, however, are based on certain fundamental principles, a ready-made filing system may be adapted to the peculiar needs for it.

The various systems of filing

In order that the private secretary may choose the system best suited to meet the individual needs and demands of his office, he should know something of the various systems of filing, and the advantages and disadvantages of each. The explanation and description of the various filing systems given below are sufficient for a general knowledge. Before having a filing system installed, however, it is advised that the private secretary send to the different manufacturers of filing equipment for catalogues. Some of these catalogues contain detailed explanation and description of filing systems and filing equipment. As vertical filing is without doubt the most efficient method of filing, no description is given of Shannon files, and other types of the so-called flat filing.

All filing systems are based on the alphabetic system, numerical system, or a combination of the two.

Filing systems can be grouped again under two main heads: self-classifying systems and card-in-

dexed systems. Direct alphabetic, alphabetic-numeric, geographical, chronological, and decimal systems are self-classifying; numerical and subject systems are in the second group, as these systems require the use of the card indexes in order to find letters or subjects in the files.

The alphabetic system is founded on the assumption that every one who uses the files knows and can easily remember the order and arrangement of the letters of the alphabet (a, b, c, d, . . .). The systems that are based on alphabetic filing are as follows:

1 — Direct alphabetic filing of correspondence by name

2 — Direct alphabetic filing of correspondence by subject

or

Direct alphabetic filing of information (other than that contained in letters) by subject.

3 — Geographic filing.

ALPHABETIC FILING

Direct alphabetic filing of correspondence by name

Direct alphabetic filing of correspondence *by name* is a system obtained by filing correspondence in back of guide cards having the letters of the alphabet. The first identifying letter of the partnership or corporation name of the correspondent

is taken (Standard Oil Company of New York; The Connecticut Company) or the first letter of the last name of the individual correspondent is taken (James R. Cady). The arrangement, in other words, is the same as that used for the city directory.

In most businesses reference is likely to be made to correspondence by the name of the writer or concern from which the letter came. This type of filing is the one which is most commonly used by the secretary himself to keep the correspondence of the chief and of the private office. With alphabetic filing of correspondence by name, such reference is easy and simple if the volume of correspondence is not great. If the numbers of letters filed back of each letter of the alphabet is small, quick reference to the folder of any correspondent is assured. The great advantage of the alphabetic system is that this system is the simplest and easiest to operate of all systems. Any one can go to the files and get the desired letter.

The great disadvantage of the alphabetic system is that its limits for the quick locating of correspondence are soon reached, if the number of correspondents becomes great. In detail, this disadvantage arises from these causes:

- 1 — As the number of letters filed back of the letter of the alphabet becomes large, it is neces-

sary to insert sub-division guides, such as "Ba," "Be," "Br," and so forth.

- 2 — Such constant addition of new guides cuts down the speed of reference and increases the dangers of misfiling.
- 3 — The "miscellaneous folders" in which are placed the papers of concerns whose correspondence has amounted to only two or three letters soon become choked and bulky.
- 4 — The problem of transferring correspondence becomes more difficult and costly each year.

In the case of the alphabetic system of filing, misfiling results in many instances from the failure of the file clerk to read the name of the correspondent correctly or from the selection of the wrong name in instances where the name of the person signing the letters differs from the firm name. Mistakes of the latter kind can easily be rectified by going over the possibilities of the way in which the mistake might have been made.

Direct alphabetic filing by subject

Direct alphabetic filing of correspondence *by subject* is a system obtained by filing *correspondence* in back of various subjects arranged in an alphabetic order. The first identifying letter of the subject is taken (**A**dvertising). This type of filing is used when the subject referred to in the correspondence is of greater importance than the name of the writer. This system has also the same advantages

and disadvantages as the direct alphabetic filing of correspondence by name.

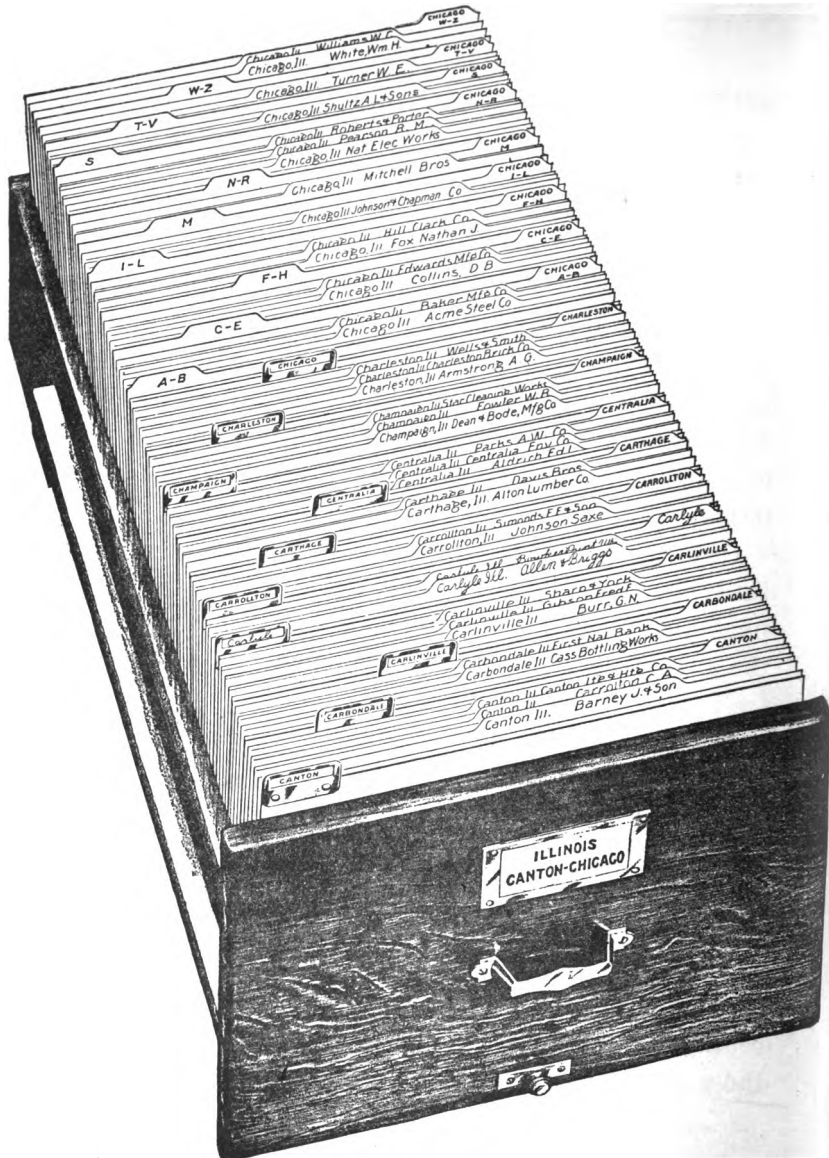
Direct alphabetic filing of information by subject is of the same type as *direct alphabetic filing of correspondence by subject*.

The equipment of these various types of direct alphabetic filing consists of alphabetic guides with their tabs or projections arranged in alphabetic order in the drawer. Next in order are the wide tab folders for individual names of active correspondents or for subject names; and lastly are the tab folders to contain the miscellaneous or infrequent correspondence, or miscellaneous subjects. The individual folders, one for each concern or subject, with name or subject and so forth typewritten direct or upon a gum slip pasted to the top, are arranged back of the proper guides in exact alphabetic order. "Miscellaneous" tab folders are arranged identical with the guides, one for each. In these folders are placed the papers of concerns whose correspondence has amounted to only two or three letters. If later the correspondence of any one of these concerns or persons increases to, say, half a dozen letters, it is removed and given its own "individual" folder. In some concerns an individual folder is used for each customer without regard to the number of letters received from the customer.

Geographic filing

Geographic filing or *town filing* is used where exact territorial divisions are of prime importance. This type of filing provides a means of grouping by itself correspondence or other material from each town. The territory (it may be a State or group of States) is the unit; towns are sub-units, with the records so separated in the files. This type of filing is suitable for mailing lists, for credit and collection work, for the filing of orders and correspondence based on territorial divisions either by State, or salesmen's and agents' territories.

Guide tabs for the different States are distributed throughout the drawers of the filing cabinet in alphabetical order. It may be that each drawer of the filing cabinet is given over exclusively to the towns of one State or territory. Then, in back of each guide card are placed the town or city guides for that State. Cities and towns are always arranged in alphabetic order. The correspondence and other material are filed in alphabetical order by name under each town and city. ~~In~~ ^{On} back of the town or city guides, accordingly, will come the individual folders upon the tabs of which are written the name of the correspondent or subject *and, preceding it, the name of the town.* The addition of the name of the town to the name on the tab of the



individual folders acts as a check in refiling. The larger cities with many individual folders require alphabetic guides to facilitate filing and finding.

Geographic filing properly comes in the general class of alphabetic systems, for here, too, it is the system based on the assumption that those who will use the files know the order of the letters of the alphabet. The principle of geographic filing is identical with that of direct alphabetic filing, except that the material (correspondence, information, contracts, and so forth) is filed by alphabetically arranged towns instead of by the original divisions of the alphabet. By this arrangement it is simple to find the folder of a correspondent if the business location is known.

NUMERIC FILING

All numerical systems of filing are based primarily on the assumption that the person making use of the files knows the order of numbers (1, 2, 3, 4 . . .). Such systems, however, are usually based on the secondary assumption that the person making use of the files knows also the order of the letters of the alphabet (a, b, c . . .), for in order to find the number assigned to a certain correspondent or subject, it is necessary to refer to an alphabetically arranged card index.

The various types of numeric filing are:

1 — Numeric correspondence filing

2 — Numeric subject filing

a — arbitrary

b — decimal subject system (based on the plan of the Dewey Decimal Classification for public libraries).

. Numeric correspondence filing

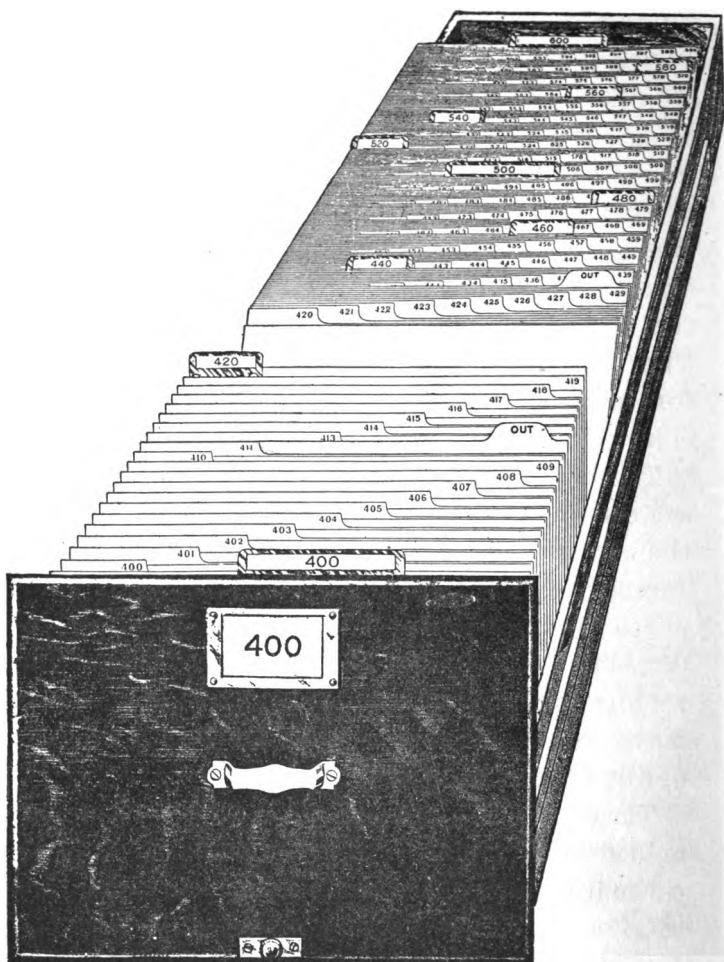
When the number of correspondents runs into the thousands and the number of letters even into the millions, the alphabetic system is no longer adequate for filing purposes. The numeric system remedies the principal difficulties of the alphabetic system in the handling of large volumes of correspondence.

In many types of business, moreover, numeric filing is the most practical and most certain in results of all filing systems. It simplifies the most complicated correspondence and brings together related papers with absolute accuracy and makes them available for the quickest reference. Where the correspondence pertaining to a given customer, subject, or contract may come from a variety of sources and must be brought together in one place, it has a peculiar fitness. No other system will so successfully handle the inter-office correspondence of large corporations between its various branches, factories, departments, officials, and salesmen.

The necessity of maintenance and of reference to a card index in locating correspondence seems an objection. Yet, in reality this feature has many advantages found in no other system. The index furnishes a complete reference list of names, addresses, and so forth of all persons or firms with whom business is transacted. All peculiarities, exceptions, and doubts are cross-referenced in the index and thus become a matter of record. The ability to find or file any paper is therefore not dependent upon the presence of the file clerk.

The advantages of the numeric correspondence system are briefly: 1, that the index number locates the correspondence in both the active and inactive (transfer) files; 2, the danger of misfiling is minimized; 3, the time that is lost in making out the index card is more than offset by the time saved in refiling the correspondence; 4, the filing number may also be made the account number, if desired; 5, filing space is saved.

The numerical system of filing correspondence has gained favor rapidly during the past few years because it permits of indefinite expansion without the sacrifice of either accuracy or speed of reference. In a large concern with a complete numeric installation, where the same number serves for letters, orders, invoices, credits and ledger accounts, the in-



NUMERIC FILING

dex proves an actual economy in operation and a saving in time not always appreciated.

The plan of numbering papers from a central index once for all on their arrival saves the time of every executive, department head, or clerk. With all responsibility placed on one competent chief filing clerk, less experienced assistants are needed for merely the mechanical work.

The equipment consists of individual folders numbered consecutively. Each correspondent is assigned a folder or a number. Guides with wide tabs in the center denote each one hundred folders. Between each pair of "100" guides, intermediate metal tab guides arranged in four rows, re-divide each group of 100 by 20's. By this method the eye is directed instantly to the folder wanted.

Operation of the card index system

The numeric system of filing correspondence depends for its operation upon the card index. Whenever a letter from a *new* correspondent is received, a card is made out that bears the name and address, and a file number. The file number that is given is the next succeeding one to that which has been given to the last new correspondent. The cards are then filed alphabetically in the file tray according to the name of the correspondent. The file clerk before assigning the number, however,

should look up the correspondent in the alphabetically arranged index to make sure that no correspondence had been previously had with him. This precaution will save duplication of folders to the same correspondent; in other words, precaution will prevent a correspondent who has already been given a number from being assigned a new number.

Upon receipt of letters, or other papers, reference is made to the card index. The file number of each correspondent is found and is then entered in the upper right-hand corner of each letter before the letters are distributed. Previous correspondence if wanted by the reader of the letter may be instantly obtained by the use of the file number on the letter. This same file number should be entered on the reply so that the carbon or press copy can be indexed. Both the letter that has been received and the copy of the reply are then filed directly by number. So it is then, that the one reference to the card index has served for both operations.

Miscellaneous section in numeric correspondence filing

Miscellaneous matter should be classified by subject, so that the actual miscellaneous section may be reduced to a minimum. Numbers are assigned to these subjects in the same manner as to individual correspondents, and are entered on all letters



INDEX CARDS USED IN NUMERIC FILING

EXAMPLE

(See illustration)

Higgins & Parks, an old correspondent, incorporates in March 1910 under the name of Parks Steel Co. The business is not materially changed and the new correspondence logically belongs with the old.

Upon receipt of such notice a new index card is filled out with the name of the Parks Steel Co., bearing the same file number as Higgins & Parks. The change in firm name is noted on both cards as illustrated.

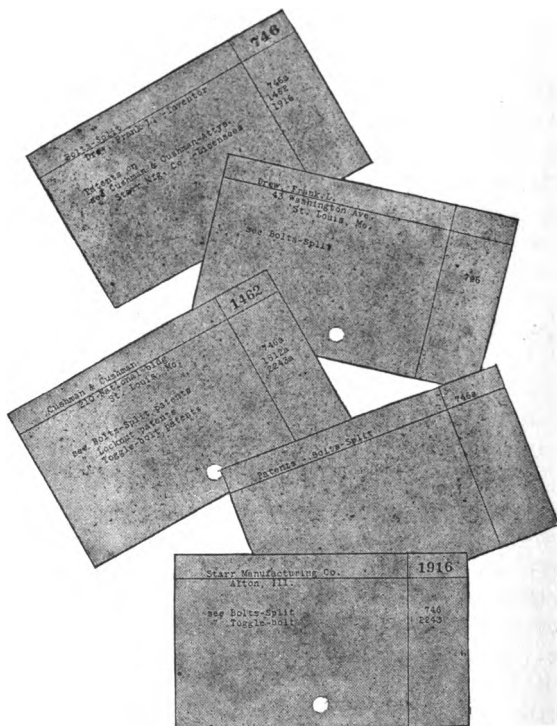
Gregory and Phillips, consulting engineers in this transaction, are given a card in the index, directing all relating correspondence to the Parks Steel Company's folder.

The latter's connection with the National Bridge Co. is similarly shown.

EXAMPLE OF TRUSTEESHIP OR RECEIVERSHIP

Edward D. Parsons and John R. Collins are both old correspondents, each with his respective card in the index and correspondence in the file. Collins is appointed trustee for Parsons; whereupon entry is made on the index cards as illustrated. Subsequent correspondence from Collins relating to the Parsons trusteeship is then filed with the Parsons papers.

Other cross references commonly used, are cards inserted for the name of selling or purchasing agent, treasurer, manager, superintendent, contractor, architect, etc.



INDEX CARDS USED IN NUMERIC FILING

EXAMPLE

(See illustration)

An index card with its number is assigned to Bolts,-Split. As Drew's correspondence is only in relation to his device, his card in the index bears merely this subject number.

Cushman & Cushman, patent attorneys, are already correspondents. On taking up the Split-bolt patent case, their index card is endorsed with a cross reference to the Split-bolt file number.

As patent matters progress, it becomes evident that the papers regarding the Split-bolt patent demand a separate folder, and the letter "A" is then added to the cross reference on Cushman & Cushman's card and all papers relating thereto transferred to folder 746A and filed directly behind the Split-bolt folder.

At the same time, a card is made out for Patents, Split-bolt.

Similar instances of cross reference to other patents are shown on Cushman & Cushman's card.

The Starr Mfg. Co. become licensees to make and sell Split-bolts, and correspondence relating thereto is therefore cross referenced to the original folder. A like reference is shown for Toggle-bolts, but correspondence with the Starr Mfg. Co. on their own account is filed under their regularly assigned number, 1916.

By this method all papers relating to the subject "Bolts,-Split" are filed together, whether relating to subject, inventor, patent attorneys or licensees.

pertaining to the subject regardless of the writers. For example, applications for employment may be assigned a number, say 342; applications for sales positions, 342-1; as stenographers, 342-2; as clerks, 342-3; and so forth. The correspondence under each division is then filed alphabetically by name. The remaining miscellaneous matter which cannot be classified by subject according to the example given above may be filed under a separate section and in alphabetical order.

Cross reference

The possibility of direct cross reference through the use of the card index is one of the great advantages of the numeric system and constitutes one of its great time-saving features. By means of a cross reference any individual letter may be located instantly, no matter whose signature it bears or under what subject it has been filed.

A letter involving more than one name or subject is indexed under the most important or under the one which in the judgment of the head file clerk will be the identifying one. Unnumbered index cards are made out for the other leading names or subjects and merely refer to the principal heading and the number of the folder in which the material will be found.

Numeric subject filing

Frequently a subject referred to in the correspondence is of greater importance than the name of the writer. Moreover, the advantages gained by filing correspondence or other material, such as information, by subject are of such importance in certain lines of business as to demand a careful study of the problem. In many offices the subject matter contained in a part or all the correspondence is of greater importance than the name of the correspondent. In this case numeric subject filing can be used to good advantage. Very intelligent and careful handling as well as a preliminary study is essential to secure logical headings and subheadings and to prevent confusion of subjects.

There are two methods in use; one is the simple numeric system in which an arbitrary number is given to the subject and which will meet the requirements of the average business; the other, a decimal system (based on the Dewey Decimal Classification for public libraries), which is especially adapted to the needs of public service commissions, railroads, or other large corporations, for the material in the files of such organizations must be definitely and permanently grouped. These two methods of numeric subject filing are discussed under the two following topics.

Arbitrary numeric subject filing

In the arbitrary numeric subject filing, sometimes called "The Straight Numeric System," consecutive numbers are assigned to the principal subjects. Special care should be taken to make the headings as clear and comprehensive as possible. These subjects may then be divided into as many dependent subjects as seem necessary, through the use of auxiliary numbers. When the division of a dependent or subordinate subject becomes advisable, a letter of the alphabet is added to the auxiliary number. The numbers used for the main subjects can be expanded indefinitely. New subjects may be added at any time by simply assigning the next unused number to a subject as it develops.

*Example:***4. Rents**

4 — 1. Office buildings

4 — 1A. Offices

4 — 1B. Stores

4 — 2. Tenements

.

15. Charitable work

15 — 1. St. Andrew's Home (General correspondence)

15 — 1A. St. Andrew's Home (Bills)

15 — 1B. St. Andrew's Home (New building plans)

15 — 2. Old Brick Church Charity Guild
(Correspondence as President)

Dewey Decimal System

In the Dewey Decimal System, all possible subjects are first grouped in ten or fewer large classes. To these classes are assigned the numbers from 0 to 9. Each class may then be divided into nine or fewer sub-classes which in turn may be divided into the same number of sub-classes. Further divisions may be made by the use of a decimal number. The divisions under each class are always limited to 9. In Mr. Dewey's own words the system was designed to serve as "a method that would index books and pamphlets on the shelves, the cards of a catalog, clippings and notes of scrap-books and index rerums, reference to all these items and indeed any literary material in any form as readily as an ordinary index guides to the proper page of a bound book."

The difficulty obviously is the construction of a satisfactory scheme of classification. As the entire field of the correspondence or subjects is divided into nine main subjects and then sub-divided into related topics which are classified decimally under main subjects, the services of an expert capable of digesting each letter and making the exact subject classification are needed. This system is too elaborate for most businesses. Unless expert hands operate it, it becomes disordered.

While not so elastic as the straight numeric sys-

tem, this method has the advantage of allowing more sub-classes and shows more clearly the relation of one subject to another. It also establishes definitely the class number for any subject so that uniformity is possible throughout the various branches or departments of an organization. The illustration given below shows the method of numbering used in the decimal system.

- 000. General
- 100. Executive Administration
- 200. Finance and Accounts
 - 250. Accounts
 - 255. Exchange accounts
 - 255. 1 Subscribers' accounts
 - 255. 11 Accounts in suspense
- 300. Construction
- 400. Equipment
- 500. Operation
- 600. Rates, etc.

Chronological filing

The chronological system of filing is devised to supply the demand for a system that will automatically bring up certain letters or other matters that should be attended to on certain days. An example of the needs that this system is intended to meet is the following: A letter is received to-day, January 15, which cannot be answered until January 21. The reason for this delay is that the information

requested cannot be obtained until January 21. The letter cannot be sent to the general files until it has been answered; it should not be left in, say, a "matters pending" folder, for if such cases are frequent, this folder soon becomes choked and unwieldy.

Such letters pending final disposal should be filed in a follow-up file, or "tickler"—a device based on the chronological system. This follow-up file is equipped with guides which bear the names of the months. In back of each month guide there are thirty-one folders numbered consecutively from 1 to 31. In other words, each folder bears a number on its tab. On each morning the folder of that date should be taken from the files and its contents disposed of. If a certain letter even now cannot be answered, it should be filed ahead in a folder which will bring the matter up at a suitable time.

CHAPTER VII

OUTLINES AND REPORTS

THE OUTLINE

"How are you getting along on the report?" asked Mr. Forbes as he stood beside his secretary's desk.

"I have just about finished the outline," answered Frank Campbell, a bright-looking man who had been the private secretary to Mr. Forbes for the past three months.

"Well, bring it into my office and we can talk it over together," remarked Mr. Forbes as he made his way towards his private office.

For a week, Campbell had been at work on the quarterly report of the President of the Forbes Steel Company. He had collected and tabulated many figures, he had talked over the situation with his chief, and now he was finishing the outline of the report.

This report was the first important piece of writing that the president had entrusted to him, and Campbell wished to show his chief that he was

worthy of the trust. He now had before him the carefully planned framework of the report.

"I hope he will like it," thought Campbell as he screwed on the cap of his fountain pen and placed it in his vest pocket. Then he picked up the two copies of the outline and went in to see Mr. Forbes.

Mr. Forbes was waiting for him and quickly took the copy that Campbell offered him. As he looked over the outline he nodded affirmatively several times.

"There are only two places that need to be fixed up," said Mr. Forbes after he had come to the end of the outline.

A consultation held their undivided attention for the next ten minutes.

"With such an outline as that, you won't have any trouble in dictating the report," said Mr. Forbes. "You ought to be able to have it in complete form for my O. K. to-morrow. It can then be sent to the printer. And if I do say so, we are going to have one of the best reports that we have ever put out. Your use of the outline is responsible."

The use of the outline

In certain instances the secretary may be called upon to write a lengthy business report, a long and important letter, a speech, a statement or in-

terview for the press, a business article, or some other form of composition of considerable length. If he is desirous of saving himself time, worry, trouble — and at the same time is desirous of securing a well-written piece of work, he should master and make use of the outline.

Before any good piece of writing of any length can be secured, a plan of construction of some kind must be clearly laid out in the brain of the writer. Now, the secretary should realize that if he begins to write his composition before he has any well-defined plan in view, he is almost sure to obtain a completed work far from satisfactory. If the composition is written without any definite plan, the clearness and logicalness of the piece of writing will suffer. Good reports, good speeches, good business letters, and good articles are not written off-hand but are carefully thought out in advance. There is little question of luck in the writing of a good composition. Ideas must be presented properly and in accordance with a certain arrangement. That is just the purpose of the outline — to help in the writing of the composition.

What an outline is

An outline is a properly coördinated arrangement of the important facts which are to be included. In other words, it is a condensed form of

notes. A common fault is that it is made too soon after notes have been taken on the subject. The material should have been collected some little time and the subject allowed to shape itself before the outline is given an opportunity to crystallize.

The essentials of a good outline

The three essentials of a good working outline are: unity, simplicity, and proportion. The principle of unity is applied by seeing that one sub-topic leads to another and all pertain to the main topic. Care should be taken to see that nothing is included in the main topic which is a part of the subordinate topic.

The outline should be simple in construction. No wearisome details should be included, and there should be no confusion of topics.

The principle of proportion as here applied means that the main ideas should be made main topics; subordinate ideas should not be made principal topics, but sub-topics of main topics. Sub-ideas should be properly subordinated.

The five steps taken in the making of an outline are:

- (1) The statement of the definitely limited subject.
- (2) The selection of the point of view.
- (3) The selection and arrangement of the main topics.

OUTLINE OF A PROSPECTUS FOR THE FORMATION OF A LABOR FORUM

I. FORUMS

1. What forums are;
2. Historical development of forums;
3. Principal forums in New York City.

II. SHORTCOMINGS AND FAULTS OF EXISTING FORUMS

1. They are supported and endowed by wealthy persons who often try to dictate the policy;
2. They are not run on democratic principles, for
 - A. General public is not admitted to membership;
 - B. General public has no voice in
 - a. Management,
 - b. Selection of speakers and topics,
 - c. General policy.
3. They are broad, community, civic forums which
 - A. Treat of public questions solely from the viewpoint of men and women as citizens and
 - B. Are non-partisan with respect to economic questions, and
 - C. Are not interested in the use of the public schools as community centers.

III. PROPOSED LABOR FORUM

1. A labor forum should be organized and maintained in the public schools, e. g., the Washington Irving High School;
2. Such a forum will treat everything from the viewpoint of men and women as workers or producers, for it will be
 - A. Non-sectarian;
 - B. Non-partisan as to politics;
 - C. Partisan as to economic principles in order
 - a. To strengthen the labor unions, and
 - b. To bring about the recognition of the working class as a class.
3. The arrangement of the program will reflect the interests of the producing class through
 - A. Speakers on economic and social topics;
 - B. Labor dramas and motion pictures;
 - C. Labor music;
 - a. Choral,
 - b. Mass singing,
 - c. Orchestral.

ARRANGEMENT OF OUTLINE

- (4) The subdivision of the main topics.
- (5) Revision to secure clearness, unity, simplicity, and proportion.

After the outline has assumed the above form, it should be carefully scrutinized for any defects in its mechanical and logical arrangement.

THE WRITING OF REPORTS

Description and purpose of the report

The secretaries of certain men are often asked to prepare various reports. The secretary's employer, for example, may be the president of a railroad. One of the duties of this employer may be to write an annual report. The work of actually writing this report often falls to the lot of the private secretary. The same fact is true of secretaries in other lines of endeavor — they are called upon to prepare and write various business reports for their chiefs.

These reports are usually statements which contain in logical form specific facts and figures pertaining to a certain phase of business. They may contain, also, recommendations or conclusions based upon the facts given in the reports.

The purpose of a report is to convey information that is of use and that is to be used, and the secretary should never lose sight of that fact. No report should be made unless it has some definite

purpose or tries to convey some definite information.

A report, moreover, implies a maker and a receiver. The latter is usually some one in authority who is to use the report and base a judgment upon the information contained in it. Accordingly, the function and purpose for which he wishes to use it should determine its character and contents. A report, for instance, to be made to go out to the stockholders of a company should be adapted to them and to their use; that is to say, the language must be clear and free from many technical words, the tone must be carefully selected, and, as the report is being made so public, extreme care must be taken in regard to various statements which in some instances must be made more guardedly than if these same statements were to be seen by, say, only the directors. If a report is to go to the head of a technical department, it need be adapted only to him.

Different kinds of reports

Reports range all the way from the short, published bank reports, and accountants' reports, which are nearly all figures, to those voluminous reports of consuls and others, which are mostly narration, description, and exposition. There is every grade of report from the mere presentation

of facts or statistics up to a dignified persuasion and the making of recommendations.

Two forms of reports are used — the personal and the impersonal. The personal is used where dignity and formality need not be observed; the impersonal style is used when these characteristics are essential elements.

As a rule, a report which contains recommendations is more important than one which contains figures and facts only. The former demands that the business judgment and knowledge of the writer be exercised in the making of the recommendation. In the latter, as only facts and figures are given as they were found, the reader is left to draw his own conclusions. In a report making a recommendation, the writer should realize the responsibility that rests upon his judgment and should act accordingly.

Arrangement of a business report

A business report is largely dependent for its value on the method of arrangement and presentation. Both the logical and mechanical arrangement of the report should, therefore, be very carefully considered. A report that is poorly arranged will not be clear to the reader — at all events the poor arrangement will prevent a report from making a good impression. A report illogically arranged is difficult to understand. Since most re-

ports are on important and intricate affairs, the easier the reading and the intelligibility of the report are made, the better.

The mechanical arrangement is necessary in order that the various topics may be easily found or referred to. For convenience of reference the report should be properly displayed. It should have numerous subheads, written in capitals, underlined, or in some other way separated from the body of the reading matter, so that they can be seen at a glance. Sometimes they are placed in the marginal space; at other times they are boxed by rules and placed in the text near the left-hand margin. In every case, margins should be wide and paragraphs should be separated by an abundance of white space. The arrangement of these headings and topics is a most important consideration in a report. For further convenience, figures should be tabulated, and maps and diagrams inserted wherever possible. A figure or chart is often worth pages of reading matter.

Recommendations should be separated from and follow the facts on which they are based. A good arrangement is secured by grouping all recommendations at the end of a report or by placing a recommendation at the end of each division of facts which necessitates one. If a report is long and involves the making of recommendations on

SAFETY, published in Chicago by A. C. Shaw Company, will reach a large number of this class in the North, and the manufacturers and dealers, like a good circulation in the Southern States as well as otherwise, have a certain advantage and cost.

With our new office just opening in Atlanta, it will be a distinct help to our Southern customers to have our Company and its product introduced to Southern prospects through the Southwestern News.

several topics, it is better to place the recommendations throughout the report following each separate division of facts or statements. If a report is short, they may be grouped at the end. In many cases where recommendations are scattered throughout the report, they are summed up at the end.

Recommendations should be simple, but definite, comparatively few in number, and should deal with only the essential points under discussion in the report.

Recommendations should not be hidden within a paragraph, but should be paragraphed separately, as follows :

We therefore recommend that an appropriation of \$10,000 be made for advertising and follow-up campaigns.

We also recommend that the present sales force be increased to forty-two.

The purpose and source of any report should decide the nature, form, and arrangement of its contents. For example, if it is informal and is to be seen by only one or two persons, it may be submitted in letter form. If the report is to be published for the benefit of stockholders, it must have an arrangement suitable for publication.

Nothing should be included in the report unless it pertains to the title and is common to it. Like-

wise, each sub-title must cover every point contained in the passage which it titles.

The beginning of a report should state its object, the ground to be covered, the sources of facts stated (i.e., whether they have been obtained by personal observation, by talk with employees, or otherwise), and the authority by which the reporter is making the report. The end should be a summary of the essential facts given and a review of the conclusions reached throughout.

The essential qualities of the report

As the receiver of a report is usually some one in authority who can profitably use the information and recommendations, the essential qualities are clearness for the first reading and convenience for reference.

To obtain clearness, it is necessary for the writer to observe the principles of unity, coherence, and emphasis both in the report as a whole and in its separate divisions and paragraphs. Simple language should be used; technical terms should be avoided unless they are adapted to and can be easily understood by the reader. Wherever possible, maps, charts, diagrams, and illustrations should be used. They are more vivid than pages of description.

The most common errors of business reports are: (1) essentials included, but the report not clear; (2) non-essentials included; (3) essentials omitted.

In some cases the writer of the report puts into the report all the essential facts and figures, but because of the ambiguous, vague, or obscure language and the illogical arrangement of the ideas the report is not clear. In other cases the writer carelessly includes ideas that are not essential. As a result, the reader of the report is confused, for, seeing that the writer has given much space to a certain idea, he believes that idea to have some value. And in still other cases the writer carelessly omits ideas, facts, or figures which should be included if the report is to be clear and complete.

For the sake of securing the necessary qualities and observing the principles of construction, an outline should first be made by dividing the subject according to some principle and then subdividing the sections as this becomes necessary. The topics thus secured should be arranged in proper order and so far as possible should be expressed in definite sentences.

Proportion in a report means that important facts should be given as much space as is needed by them; and unimportant, but not unessential facts, should be given as little space as possible. A wordy report is an abomination. The reader will be saved

much time and effort if the report is made as concise as possible.

These four points, then, should be checked up in revising the business report: (1) arrangement (mechanical and logical); (2) proportion; (3) clearness; (4) conciseness.

It is important that the writer of a report do not use an aggressive or argumentative tone, for the reader is likely to think that the reporter is biased and is trying to force his opinion upon the reader. Far better is it to use the deductive method; in other words, the facts, such as they have been found, should be presented in a cold way, and at the end deductions should be drawn logically from them.

CHAPTER VIII

TELEPHONING, TELEGRAPHING, AND CABLING

TELEPHONING

"I've got a compliment for you," said Mr. Forbes addressing his private secretary, Frank Campbell. "At luncheon, to-day, two of my friends remarked that they received the most courteous treatment in the city over the telephone from my office.

"Those two men," continued the chief, noting the smile on Campbell's face, "are not flatterers and I believe what they say. Personally, there is nothing that I dislike so much as rudeness over the telephone. Hence I'm especially pleased to hear from outsiders such a favorable opinion of us. How do you do it?"

"It's rather easy," answered Campbell pleased with the compliment. "Just a matter of tone of voice and promptness."

"I know," said Mr. Forbes. "But I meant, how did you come to learn it?"

"Well, to be frank," said Campbell, "I had so

many disagreeable experiences myself in telephoning when I first came here to work for you that I soon found out I could handle calls better and get better results if I was extremely courteous in voice and manner."

Answering the telephone

Much of the chief's time can be wasted and much annoyance can be caused him if he were to answer the telephone every time it rang. Here again is another place where the secretary should act as intermediary to save time and trouble for his employer. All incoming telephone messages for the chief should first come to the secretary, who will pass judgment upon the call. If it is necessary that the chief should talk to the person at the other end of the wire, the secretary can switch him in.

In passing upon the person calling, the secretary will make use of practically the same principles that have been laid down in regard to the handling of personal callers. There is, however, one main difference — the secretary cannot judge the telephone caller by his personal appearance, as he is able to do with the personal caller. In that respect is he put at a disadvantage. The actual conversation, nevertheless, might be said to be nearly identical with that used with the personal caller (see page 45).

When the telephone bell rings, the secretary should answer "Mr. Blank's office" or "This is Mr. Blank's secretary talking." "Hello" is usually unnecessary. The following conversation, for example, might then take place:

Caller: I wish to speak to Mr. Blank.

Secretary: He is busy just at this moment. May I have your name?

C: Mr. Barton.

(Secretary should be sure to get the correct name of the caller. If he is not sure of it, he should ask the caller to spell it out.)

S: And you wish to speak to him about —?

C: — the Board of Directors meeting of the Second National Bank for to-morrow morning.

(Secretary is satisfied about the matter.)

S: If you will hold the wire for a moment, I'll see if I can get Mr. Blank to the 'phone.

(Secretary will then tell his employer the name of the person calling and his business. The employer is thus prepared to talk with the caller and is then connected.)

For other occasions when the caller is reluctant about giving his name, his business, and so on, the secretary will follow out about the same conversations as are given on pages 45-49 for the handling of personal callers.

Using the telephone

Tact, quickness of wit, and a pleasant voice are the main qualifications that are needed in the han-

dling of the telephone. The same kind of tact that is needed in managing personal callers is needed in handling the telephone caller. If anything, more quickness of wit is necessary in the transacting of business over the wires than is needed elsewhere.

As both tact and quickness of wit will be discussed at some length in succeeding pages (see pages 304 and 306), these points need not be considered in detail again here. The manner of speaking over the telephone is, however, deserving of much attention. The favorable impression that is made on the person at the other end of the wire by a clear, clean-cut voice, restrained, and of pleasing tone cannot be overestimated. The secretary should try to cultivate such a manner of speaking over the telephone if he does not possess it already. He should be especially careful of the inflection of his voice. One of the easiest methods by which to secure a reputation for being a good secretary is as follows: be very courteous, speak gently and distinctly. Little competition will be found.

It may seem strange, but yet it is a fact, that many persons unused to the telephone actually dread telephoning. Such nervous fear must be overcome at once. The speaker must have no timorous feelings to impair his efficiency. The correct way to talk over the telephone is to speak clearly, distinctly, with every word well enunciated. The

lips should be close to or nearly inside the mouth-piece of the transmitter. The secretary should not talk at the telephone, but into it. Many secretaries have the fault of being unable to realize that they are talking not to a piece of mechanism but to a person. The secretary should be courteous to all telephone callers. A low, restrained voice will carry better over the telephone than will a loud voice. The voice should not be pitched higher than the normal tone. As a matter of fact, the voice pitched lower than ordinary is better. *And speak slowly!* The habit of slow, deliberate, careful talking must be acquired.

The whole attention should be concentrated upon telephoning. No attempt should be made to do other things at the same time, such, for instance, as signing or reading letters. If such an attempt is made to do other work, it is likely to mean an incoherent and indistinct talk, because the doing of other things at the same time distracts the attention of the talker from the thoughts that are being uttered, and also is likely to take the mouth of the talker away from the transmitter.

A gruff, "important" tone or voice should never be used. The secretary may not always know who is at the other end of the wire. Moreover, the impression made on any listener is extremely vexa-

tious. A pleasant voice, "a voice with a smile," is of great value in telephoning. It shows that the listener's feelings are being considered. It aids in transacting the business quickly, easily, and pleasantly for both persons.

The person who is telephoning into the office should be treated as courteously over the telephone as is the caller who comes in person. It is unnecessary that the secretary should show how business-like he is by speaking curtly and snappishly. Nor should the caller be kept waiting long. The telephone should be answered as soon as possible. If the call is for the chief, and if the secretary has found that the chief will talk over the telephone, the secretary should try to get the chief to take up the receiver as soon as possible. If he is busy at the time and will be busy for a few minutes, the secretary should tell the conditions to the caller and let him decide whether he will hold the wire for a few minutes or will call up again. Or the secretary can ask the caller to leave the message; or he may say that he will notify him by telephone when the chief becomes disengaged.

To recall "Central" or the exchange operator, the receiver hook should not be jiggled rapidly. The correct way is to move the hook slowly up and down.

Handling outgoing calls

When the secretary is asked to get Mr. Blank, an important and busy man, on the wire, the secretary usually talks with Mr. Blank's secretary. He will say: "Mr. Ivens, President of the United Flour Company, wishes to speak with Mr. Blank about next year's contract." The secretary of Mr. Blank gets Mr. Blank to the telephone. Then Mr. Ivens's secretary must act carefully. It is wise not to say: "Just wait a minute, please." Far better is it to say: "Mr. Ivens, President of the United Flour Company, wishes to speak with you." Such a statement made by the secretary implies that Mr. Blank should hold the wire. This method is not so blunt or so likely to lead to the irritation of Mr. Blank as the other method.

In certain cases where both men concerned are important men, the secretary of each will try to get the other principal to the 'phone before his own chief takes the 'phone. Secretaries do this in order that they may save their employers the trouble of saying, "Hello, Mr. Blank?" and of then finding out that the person talking at the other end of the wire is Mr. Blank's secretary.

In some cases the battle of wits between the two secretaries, each striving to get the other man on the wire before he puts his own employer on, lasts for four or five minutes. Various subterfuges and

stratagems are used. One secretary will say, "Yes, Mr. Smith is here and is ready to talk. Put your chief on." The other secretary will say: "Just a minute"—and then a few seconds later will say, "Hello, is this Mr. Smith?" hoping that in the meanwhile the other secretary will have put on his own chief. As a rule, however, where the employers are of about the same importance in business, the secretary who is calling up the other man should give in.

Other points about incoming calls

Whenever a telephone call comes in while the chief is out, the secretary will first try to handle the call himself. If, however, the matter is not within his jurisdiction and if he is unable to handle it, he should, if possible, get the other person to leave the message. If this is unsuitable, he should make a telephone appointment, that is to say, he may ask the other person to call up at a certain time when the chief will be in, or he may say that he himself will call the other person up when the chief comes in.

The secretary should always have handy on his desk near the telephone a pad upon which he can take notes of various conversations which come to him over the telephone. By having this pad handy he will save much time and the confusion which

would otherwise arise if he had to leave the desk to find paper upon which to write the message. The time at which important messages are received should be noted and the name of the caller should be taken. Any notes about the secretary's conversation may also be jotted down. It may be wise, moreover, to enter each separate note as closely as possible to the one preceding it. These slips of paper should then be saved, for they will serve as a record of telephone transactions. If the secretary will train himself to take and hold the receiver with his left hand, he will find it an advantage, for he will thus be able to make use of his right hand to jot down the notes he takes over the telephone.

A list of telephone numbers should be kept handy also, for if the employer says: "Get me Francis Hall & Co. just as soon as you can," the secretary should not be compelled to look in the telephone book. This list of numbers, of course, will contain the telephone numbers of those concerns and places which are frequently called up on the telephone.

TELEGRAMS

The secretary should make himself acquainted with the matter of sending telegrams, for he may at any time be called upon either by his employer or by events to make use of this method of transmitting messages. This is especially true since in

the present days so many various uses of the telegraph have come into being, such, for instance, as the "Lettergram" or "Night Letters."

The ordinary telegram should be written in a language which is, first, absolutely clear and, second, as brief as is compatible with clearness. Of these two requirements the first is the more important. If the message is not clear, it not only is useless but it might easily cause financial loss or disagreement. But at the same time if the message is not as brief as possible it is wasteful. The secretary should, therefore, make a study of the writing of telegrams, so that he may train himself to send explicit and concise messages without difficulty.

The minimum charge for telegrams is based on ten words, not counting the name, address, and signature. Since this is so, nothing is to be gained by reducing the message to less than ten words. A charge at a certain fixed rate is made for every word over ten. If, for example, the rate for ten words is eighty cents, each extra word above ten is charged eight cents.

Certain points about the writing of telegrams should be noted. Avoid an arrangement of words which can be interpreted in two ways. Sentences should be clear and should not depend upon punctuation for their clearness. Telegraph companies do not hold themselves responsible for punctuation

and in many cases where punctuation is used trouble is caused. An example of this is given in the case where one man telegraphed: "No! Price is too high." The telegraph company transmitted it so that it reached the other person as: "*No price is too high.*"

Write sentences so that, even though they are run together, the meaning is clear.

Use no salutation, or complimentary close. All words that do not add to the clearness and that might just as well be left out should be omitted, as:

(The) CONCERN ACCEPTS (your) OFFER
(to) BUY EIGHTEEN NUMBER TWENTY-
FIVE CARS DELIVERY (on) APRIL FIF-
TEEN.

Usually, first person pronouns may be omitted where they are certain to be understood. Words in a telegram should not be divided. Compound words are accepted as one word, as *to-day*, *to-morrow*, or *to-night*. In ordinal numbers, such as 18th, 23rd, and so forth, the suffixes *st*, *d*, and *th* are counted as extra words. All numbers, therefore, should be spelled out. There are two reasons for spelling out numbers: (1) it assures greater safety in having numbers transmitted correctly in the message; and (2) a saving in cost is made.

Each of the following is counted as one word:

- A** — Every separate letter, such as the *B* in Henry B. Huyler.
- B** — Every word in a person's or concern's name.
Example: Phillips and Van Brunt Co. (four words). A surname, like Van Brunt, is counted as one word.
- C** — Every dictionary word (in cablegrams, words that exceed fifteen letters in length are counted as two words).
- D** — Each figure, as 400 (three words). It should be noted that, if this number is written out (four hundred), it is counted as only two words.
- E** — The names of villages, towns, cities, states, territories, provinces of states and territories; common weights and measures; figures, decimal points, and punctuation marks within the sentence.

Examples:

New Hampshire.....	one word
New York.....	one word
A. M.....	one word
P. M.....	one word
C. O. D. (written <i>cod</i>).....	one word
C. I. F. (written <i>cif</i>).....	one word
$\frac{1}{8}$ (figures and division bar)....	three words
one eighth.....	two words
F. O. B. (written <i>fob</i>).....	one word
per cent.	one word
O. K.	one word
Alright (for <i>all right</i>).....	one word
25000	five words
Twenty-five thousand.....	three words
$52\frac{1}{8}$	five words

No charge is made for the signature of the sender or for the name and address of the person to whom the message is sent. If the sender adds his own street and number, a charge is made for such addition.

Conciseness must not verge upon abruptness or curtness in sending messages to private people on personal or social matters. Inability to fulfil a social engagement ought naturally to be more fully expressed than a message to a business house urging a despatch of certain matters, for it is wise to avoid brevity that seems discourteous or parsimonious. The following telegram is an example of one sent on a personal matter.

MR JOHN M HEWITT
29 ORANGE STREET
PITTSBURGH PA

EXCEEDINGLY SORRY THAT A PREVIOUS
ENGAGEMENT PREVENTS MY MEET-
ING YOU AT STATION FRIDAY FIVE
OCLOCK PLEASE COME TO MY OFFICE
DIRECT

FRANK CARLEY

The above telegram is better suited in this personal matter than would be the curt note given below :

MR JOHN M HEWITT
29 ORANGE STREET
PITTSBURGH PA

CANNOT MEET YOU STATION FRIDAY
FIVE OCLOCK COME TO MY OFFICE
FRANK CARLEY

Codes

Code systems are used extensively in telegraphing and cabling, for two reasons: first, in order to save expense; and second, to insure secrecy. If a code system is used by the employer or in the employer's business, the secretary should make himself acquainted with it so that he may have no trouble in using it.

The code system is based upon these assumptions:

1 — that both the sender and the receiver of the message understand that a code or a prearranged method of communication is being used.

2 — that each of the two persons concerned has in his possession a code book so that he may translate the meaning of the message. One word in a code will usually represent several words, a phrase, or a sentence. For example, *analogous* might mean — "We are shipping your order by fast freight."

If the secretary finds that his employer or his employer's concern has no code book, he should make use of such systems as the "A. B. C." or the Western Union. Of course, if he uses these public code systems, he does not secure secrecy for his message. If he needs to have absolute secrecy for his message, he must use a system prearranged with the person receiving the message. There is no reason why the secretary cannot make up his own code and put it into the hands of his correspondents.

If he does make up his code, he should follow out the following rules:

1 — Each code word should be a real word in a recognized language; not an arbitrary combination of letters or figures.

2 — Code words must be pronounceable.

3 — No code word should contain more than ten letters, if it is to be charged as one word.

EXAMPLES OF CODE WORDS

<i>A. B. C. Code Word</i>	<i>Meaning</i>
Outstand.....	Until further orders
Resultant.....	Subject to reply in 24 hours
Mare....	Shipment stopped in consequence of strike
Worsted.....	Write full particulars by next mail.

If no particular code has been agreed upon between the persons interested, the message may start "abc code," which will indicate to the person receiving the message that the rest of the message is to be interpreted by the A. B. C. code book.

When messages in code are received by the secretary, it is his work to look up each word in the code book and write out the message in plain language. This is like translating from a foreign language into English. Some judgment is required, for code phrases often only approximate in meaning what was intended to be said. Hence, in translating the message the secretary should make two transla-

tions: (1) the literal translation which is the exact translation of the code words; and (2) underneath the literal translation should be little changes suggested by common sense in order to make clear the real meaning of the message.

Classification of telegrams

The secretary should also be informed of the various kinds of telegrams so that he may use the one best suited to his particular case. In general, there are six main kinds of telegrams:

1. The regular day message, to which the standard rate applies: i.e., a certain rate for ten words or less and an added charge for each additional word pro rata.

2. The night telegram, which is accepted up to 2 A. M. at reduced rates. This message is sent during the night and is delivered the morning of the ensuing business day. It should be written on the usual blank furnished for night messages. The rate is about 15 per cent. less than day rates, but there are no night rates when the day rate is a dollar or more.

3. The day letter, which is a deferred day service. The rate is also lower than the standard day rate and is as follows: one and one-half times the standard night letter rate for the transmission of fifty

words or less, to which is added one-fifth of the initial rate for each additional ten words or less. These letters must be written in plain English. No code language is allowed. Day letters are not allowed to interfere with the regular day telegrams in the matter of transmission and delivery.

4. The night letter, which is governed by the same conditions which govern the night telegram, with these additional points: night letters are accepted up to 2 A. M. for delivery in the morning of the ensuing business day. The rates are lower than those for the standard night telegram. These rates are as follows: the standard day rate for ten words is charged for a night letter of fifty words or less, to which is added one-fifth of the standard day rate for ten words for each additional ten words or less. No code language is allowed and the company is permitted to deliver night letters by mail after they have been transmitted to the city or town of destination.

5. If the sender of a telegram desires to assure himself that it has been sent correctly he may have it repeated — that is, he may have it telegraphed back to the sending office for comparison with the original — by paying one-half the usual rate in addition to the original charge.

6. The telegraphic money order in which the telegraph company transmits money for the sender.

Miscellaneous points

The secretary should always make a carbon duplicate of the telegram. In fact, triplicate copies are made in many cases: one is sent in a letter that confirms the telegram: another is filed in the regular correspondence file or in a separate file kept for telegrams; and the third is given to the telegraph company to be transmitted.

Telegraph companies are compelled by law to send a message *exactly as it is written without change or the alteration of even obvious mistakes.*

Cablegrams

If the secretary is called upon to do cabling, he should procure from the telegraph company the rules which govern cablegrams. Cablegrams are subject to rules which differ greatly from those that govern the telegram in the United States, for they are based on the International Telegraph Regulations. Certain points, however, might be noted, as follows: a word of more than fifteen letters is charged as two; *every word* is counted, including name, address, and signature. If full rate is paid, code language is permitted and expedited service is secured.

Half-rate messages (deferred half-rate) are subject to being deferred in favor of full-rate messages for not exceeding twenty-four hours. These mes-

sages must be in the language of the country of origin or of destination, or in French. This class of service is in effect with most European countries and with various other countries throughout the world. Full particulars will be supplied on application at any Western Union office.

Cable letters can be used for plain-language communications. The language of the country of destination may be employed, if the cable-letter service is in operation to that country. These messages are subject to delivery at the convenience of the company within twenty-four hours if telegraphic delivery is selected. Delivery by mail beyond London will be made if the prefix CLP is written before the address. The rate between New York, Boston, Halifax, or Montreal and London or Liverpool, is 75 cents for thirteen words including the necessary prefix and 5 cents for each additional word. Rates from interior points are slightly higher.

Week-end letters may be used. These are similar to cable letters except that the rate between New York and the other places above mentioned is \$1.15 for twenty-five words including the necessary prefix. Excess words are charged at the rate of 5 cents each. These messages must be filed before midnight Saturday for delivery on Monday morning, if telegraphic delivery is selected.

Wireless telegraphy

Because of the fact that the use of wireless telegraphy is becoming so common, the secretary should know something about it. The method of transmitting messages by this means is about the same as the method used by the secretary in sending messages by cable and telegraph. It might be noted, however, that both the cable and wireless system of the counting of words and charging for them are alike, that is, the address and signature are counted and charged for.

To send marconigrams from the United States to Great Britain and Ireland, the secretary should have his message presented at the offices of the Western Union Telegraph Company or the Great North-Western Telegraph Company. If the secretary is called upon to use the wireless very often, he will find it advisable to procure the pamphlet "Instructions for Radio Communication" from the United States Department of Commerce and Labor. This pamphlet contains complete information on radio communication.

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CHAPTER IX

SOURCES OF INFORMATION

WHEN Frank Campbell, private secretary to the president of the Forbes Steel Company, reached the office at 8:30 that Monday morning, he found awaiting him the following telegram from his chief:

MR FRANK CAMPBELL
15 WALL ST N Y CITY

SHALL NOT RETURN TILL TUESDAY
ABOUT FOUR MUST MAKE AFTER DINNER
SPEECH ON BONUS SYSTEMS HOTEL ASTOR
AT EIGHT OCLOCK PREPARE SPEECH FOR
ME

J C FORBES

Campbell noted that the telegram had been sent from Mr. Forbes' country home at Highland Falls and reasoned that Mr. Forbes had decided to lengthen his week-end with his family.

As the Monday morning mail was always rather heavy, and as other pressing matters needed to be attended to, it was nearly two o'clock before Campbell could give his attention to the wish expressed by his chief in his telegram. For several moments

he sat before his cleared desk and thought about the speech on "Bonus Systems" which Mr. Forbes was to deliver. He tried to recall to mind the after-dinner talks he himself had heard in order to decide on the kind of speech that would be suitable.

"Two things are needed anyway," he finally thought. "— Good, solid facts about bonus systems and a couple of apt jokes. The public library at 42nd Street will give me the facts; I shall furnish the jokes. But first, the facts."

"Miss Ray," he said addressing the confidential stenographer, "I'm going up to the library and shall probably not return until about five o'clock."

Then, after having told her how to handle certain matters during his absence, he slipped a package of note cards into his pocket and left the office.

During his trip on the subway, he carefully considered the topic about which he was seeking information so that by the time he arrived at the library he had definitely planned his course of action. He took the elevator to the card-catalogue room where he quickly found the references he desired. These references were not only to books, but also to magazines and newspaper articles. He discarded from his list of references all but the latest and seemingly most authoritative and then handed the revised list to the attendant.

Within a few moments he was seated at one of the

long tables in the reading room, eagerly scanning the table of contents and indexes of five books. Next, he read the most promising parts of these books. As he read, he made notes on his note cards. At the end of an hour he had before him quite a little stack of cards — each card of which contained only a single note.

He returned the books to the desk and went to the magazine room where he repeated the procedure. From there he went to the newspaper room.

At five o'clock Campbell was back at the office. He cleaned up the few remaining business matters of the day and departed for home — and work, for he had to write the speech that night if it were to be done at all.

It was late that night before Frank Campbell had finished the skeleton outline and the rough draft of the speech, but the sound sleep, induced partly by fatigue and partly by the consciousness of work well done, left him much refreshed the next morning.

As soon as he reached the office in the morning, he dictated the speech to Miss Ray by making use both of the outline and the rough draft. He then dismissed the whole matter from his mind and concentrated his efforts on the work of the day.

Half an hour later Miss Ray brought to his desk the completed typewritten speech and four carbon

copies of it. Campbell immediately scanned the work, made a few corrections and changes, and slipped it into the drawer of his desk.

Mr. Forbes did not arrive at four o'clock as he had telegraphed Campbell. But at 5:30 he walked rapidly into the office and greeted the somewhat worried Campbell.

"I was detained by a tire blow-out," panted Mr. Forbes. "Must hurry along and get dressed. Is the speech ready?"

"Yes, sir," said Campbell. He reached into the desk drawer, pulled out the typewritten copies of the speech and the outline which he had typed on the note cards. These he handed to his chief, who hurriedly glanced through the material, nodded to himself once or twice, and then rushed out of the office, stuffing the sheets into the pocket of his duster.

When Mr. Forbes arrived at the office at 9:15 Wednesday morning, he first answered the greeting of his secretary and then said, "The talk made quite a hit last night. But where did you get such good ideas?"

After Campbell's modest narrative of how he got the information, Mr. Forbes remarked, "That just goes to show how valuable it is to know where to seek information."

How and where to find needed information

A valuable asset to the private secretary is the ability to secure needed information. There is an old and true saying to the effect that "it is not so much to know, as to know where to find." If the secretary is employed by a chief who is often called upon to make speeches, to write articles on financial and other business matters, he will find it wise to make himself acquainted with the various sources from which he can obtain information. This information will be of aid to the secretary if he himself does the actual writing of the compositions, or will be of help to the secretary in criticizing the finished product. Often the work both of collecting the material and of writing will devolve upon the secretary himself.

If the subject of the composition requires that more information be secured than that already at hand, the first main source is the public library. Too little use is made by secretaries of the advantages offered by the public library. In preparing himself to write on the subject assigned to him by his employer, the secretary should be thorough and painstaking in securing the necessary information, for the employer relies upon him to produce the best possible piece of work. Usually it will be found that poor articles or compositions are caused by the lack of thoroughness on the part of the sec-

retary in securing all the possible information. If the secretary will have recourse to the public library, he will have at hand the tools for doing good work.

The secretary, who is called upon to do much looking up of information for his chief, should first of all master the methods of searching out the desired facts at the library. He should understand how to use the card catalogue and the various books of reference to secure information on non-recent material; he should know which magazines and books of reference to use to secure information on up-to-date or current topics.

The secretary should first judge whether the subject about which he is securing information is recent or non-recent. If the topic is of recent event, it is almost useless to go to the card catalogue; the recent magazines and the newspaper files should be consulted. But if the subject is of non-recent occurrence, the card catalogue will be found very helpful.

The card catalogue or card index of the ordinary public library has the subjects, the names of the authors, and names of the books arranged together alphabetically. Hence, if the name of the author or if the name of the book is known, the book containing the information can be easily secured. But if neither the name of the author nor the name of

the book can be recalled, or if both are unknown, reference should be made to the specific subject. If nothing is found there, reference should be made to the subject that *includes* the subject being looked up. For instance, suppose the secretary is asked to collect information for an article on "Panics and Depressions in the United States." If upon reference to the subject "Panics" he is unable to find anything in the card catalogue, he should look under "Depressions." If nothing is found there, however, he might look for a comprehensive work on the financial history of the United States or on finance — the general subject, which includes the specific topics of "Panics," and "Depressions." There at least will he find books. He can procure these books and turn to the indexes where he will find references to "Panics" and "Depressions." After he has found some information, he should not consider that he has exhausted his resources. There may have been magazine articles on the subject. To find such references, he should ask the librarian for "Readers' Guide to Periodical Literature," the purpose of which is made sufficiently clear by its title. This book in large libraries will be found on the shelf given over to reference books in the card catalogue room. After he has obtained this book, which is kept up-to-date by sections published monthly, he should look up his subject under

various heads, as, "Panics," "Depressions," "Finance," "Financial Panics," "Financial Depressions," "Economics," and so forth. References will contain the name of the magazine, the volume number, the month or week of publication, and the page number of the article.

"Poole's Index" (the need filled by this publication is now filled by the "Readers' Guide to Periodical Literature," the "Readers' Guide Supplement," and the "Industrial Arts Index"), the "Annual Library Index," and the "United States Catalogue" (the "Cumulative Book Index") can be used. References in these indexes, however, may be made to books not in the library. If he needs these books the secretary can then secure them through his bookstore. The various encyclopedias will furnish leads which will be of aid in looking up the subject. The reference librarian or the librarian himself is usually glad to help in the search and should be consulted.

When the matter to be looked up is of some current topic, such as "The Effect of the European War on the Exports of the United States," reference must be carried still further. "The Readers' Guide to Periodical Literature" will be of great aid in giving reference to magazine articles, for as the subject is of such a recent nature few, if any, books will have been published on it. The latest monthly

supplement of the "Readers' Guide" will be referred to. Even that, however, may be a month behind, so recourse should be made to such monthly magazines as the American "Review of Reviews," and "World's Work." Reference to weekly publications will bring the reference nearly up to date. Such publications as the "Nation," "Outlook," "Independent," "New Republic," "Current Events," and "Literary Digest" will be found valuable. *And the secretary should also make use of the table of contents and the indexes.* This act will save much time.

In the special subject given above, "The Effect of the European War on the Exports of the United States," such special trade papers as, "The American Exporter," "Exporters' Review," "Wall Street Journal," "Moody's Magazine," and so forth must not be overlooked. And last, the newspaper files should be consulted in order to bring the list of references up to date. The secretary should remember that he cannot do justice to himself and to the composition he is to write for his employer until after he has secured comprehensive information on the subject.

The secretary as a source of reference

The secretary himself should be a source of information on outside matters and on matters di-

rectly connected with the employer and his affairs. He needs to have a general knowledge of matters connected with his employer's business so that he may converse intelligently with callers who are likely to be interested in the same business endeavors. He should also be well read on current events, on the hobbies of his chief, and should note any items of news or information about matters that pertain directly to the chief.

The secretary should come to the office in the morning with the important news of the day in his head so that he may be prepared to talk with the chief or with the callers on such current events. He should read at least two morning newspapers, for items of news missed by one paper may be found in the other paper. Editorials will give the secretary good points which may be brought up in discussions. The newspapers should also be read for matters of interest to the chief personally or to his business.

If any item of news is found which, in the judgment of the secretary, ought to be saved, this item should be *immediately* clipped, as much time is lost and many points are forgotten if this is not done immediately. Such items once passed by are difficult to find later. The value of keeping and properly classifying clippings and other memoranda is great. Such a collection of information will be a

source of gratification, for the secretary will be able to put his hands on just the information he wants when he is suddenly called upon to write a speech, article, etc. These clippings, however, should not be kept in a scrap book because of the difficulty of indexing them. A better method is the envelope system. The envelope system is no more nor less than an alphabetical filing system with envelopes instead of folders. The clippings are dropped in the envelope.

Until recently it has been extremely difficult to use the back files of newspapers for information on news items because of the lack of an index, and hence the necessity to look through many papers before the item could be found. This want has now been filled by "The New York Times Index." By the aid of the index the details of events are quickly found — who participated and what was said and done; the developments, with all dates and references grouped. For complete information it refers to page, column, and issue of the "New York Times"; also, through the dates, it serves as index to the news of any other newspaper.


Trade journals and trade papers, business journals, and professional journals in the particular field of his employer's business or profession, should be carefully read. Articles of merit will be found in such magazines which are worthy of preservation

for future needs. If the secretary does not wish to mar the magazine by clipping the article, he can enter the title, subject, and author of the article and the name, volume, and page of the magazine on a card which will then be filed in a card index kept for this purpose.

Digests should be made of bills that are appearing in the state legislature or in Congress which bear upon the operation of his business. These bills should be examined for any dangerous features.

Such books of handy reference to facts, figures, and other information as the "World's Almanac," the "Statesman's Year Book," "Who's Who," the "Social Register," and so on, should be at hand to be consulted by the secretary.

Secretaries in certain positions will need to know the many points about postal rules. Upon application, the Postmaster-General (Washington, D. C.) will send the pamphlet "Postal Information."



CHAPTER X

EDITING, PRINTING, AND PROOF READING

Supervision of printing

AMONG the duties which the private secretary may be called upon to perform are those included under the general title of supervision of printing. His chief may be concerned with certain matters which involve printing. In such a case, the supervision of this printing will devolve upon the private secretary. The secretary, accordingly, should acquire a sufficient knowledge of printing to handle these matters satisfactorily. For instance, suppose that the chief, as president of a certain corporation, is called upon to submit to the stockholders his annual report — printed. In this instance, the secretary should not only help in writing the report, but should also supervise the whole procedure necessary before the printed copies are placed in the hands of the stockholders. He would need to arrange with the printer for the printing; i.e., the ~~cost~~, the paper, the form, the type to be used, the general make-up, the date of delivery, and so

forth. Then he would need to read the proof that the printer submits to him. In reading the proof he would need to exercise not only his knowledge of proof reading, but also his editorial powers in regard to revision.

Without a knowledge of such matters, the secretary is likely to get into difficulties and waste much time.

The supervision of printing can be broken up into three main divisions, as follows: (1) editing, (2) arrangements for the printer, and (3) proof reading. Although certain sub-editorial work might well be considered under editing, yet more clearness will be secured in this discussion if sub-editorial work is considered together with proof reading. With that exception the order of the three divisions is the logical and chronological order.

Editing the manuscript

After the ideas of the chief have been put on paper and have been criticized and O. K'd by him for their content, the secretary should carefully go over the manuscript (the abbreviated form is MS.) and edit it. This editing will consist in the revision of the manuscript to catch errors in spelling and in the grammatical structure of the sentences. Some of the sentences will need to be changed to avoid awkwardness, to obtain clear expression,

smoothness, and so forth. Paragraphs need to be examined for unity, or singleness of thought, for coherence or logical arrangement of ideas and clear connection, and for emphasis.

The whole composition should be considered from several angles to see whether or not the arguments or ideas are in logical arrangement; whether the main idea is brought out well; whether the points which need stressing are stressed; whether the tone, character, and type of language used are the best for this specific composition; whether the reasoning is logical and proves the case; and so forth.

All proper names should be checked up for their spelling. Whatever facts and figures are given should be verified.

Preparing "copy"

The first draft of matter sent to the printer is called "copy." If care is taken with the preparation of the copy that is to be sent to the printer, a great amount of trouble can be avoided. The first rule that the secretary should learn is that it is easier to make changes in the copy than in the proof. Moreover, author's corrections (the name given to the changes made by the author in the proof) are costly and mean much trouble both to the printer and the author. The copy should be as clean as possible from crossed-out words and in-

terlineations, and should be as legible as possible. Many secretaries in preparing copy for the printer have the idea that the compositor can decipher any kind of scrawl. They send copy to the printer which the compositor can hardly read; in fact in many cases he cannot read it. In all events, the result is that the typesetting is slowed down and mistakes are made. The compositor is bound to follow copy in word and fact unless there should be instances of punctuation or spelling obviously wrong, which he may correct if he catches them. Copy, however, should not be sent to the printer with the idea that the printer will correct it before it goes to the compositor, or type-setter.

—The following points in regard to the matter of preparing copy should be noted:

- ✓ 1. The copy should contain all the ideas which the writer wishes it to contain. In other words, the copy should be complete. Changes in type take time and cost money. The addition or canceling of a single word in the middle of a paragraph may necessitate the resetting of the paragraph from that point on.
- ✓ 2. Write on only one side of the sheet of paper. These sheets should be carefully numbered and arranged in consecutive order, but should not be fastened together. The sheets should be of the same size and not too large. In many cases the

whole number of sheets is divided up among four or five compositors by the "copy cutter." Each batch of "copy" given to a compositor is called a "take." The letter size of sheet, $8\frac{1}{2} \times 11$ inches, is the convenient size for the printer and compositor.

- ✓ 3. It is best to have the copy typewritten and as clean as possible, with little opportunity for the compositor to go astray. Double or triple spacing between lines should be used so that legible interlineation is possible. A margin of at least one inch should be left at the top.
- ✓ 4. Wide margins should be used so that instructions to the printer, inserts, etc., will not be crowded. Do not write lengthwise in the margin. Marginal up-and-down writing makes hard work for the "copy cutter" who divides the copy into "takes" for the typesetter. Copy should never be rolled. It should be sent flat or folded.
- ✓ 5. The copy should be marked for different sizes and kinds of type, capitals (i.e., if a word is to be put into capitals), different fonts (style of face of type), arrangement, and so on. The proof-marks used on copy to direct the compositor in regard to capitals, small capitals, italics, and so on are illustrated under "Proof-Marks" (see page 238). Directions for the printer written on the copy should have a circle drawn around them so that they may

not be confounded with reading matter or inserts.

6. Never divide a word so that part remains at the bottom of one page and part at the top of the next page. In general, avoid the dividing of words from line to line. Make your copy easy for the printer to follow.

7. Use special care in writing names and figures. Never correct by back spacing and writing over a name or figure without erasure first.

8. Be particularly careful if obliged to write in long-hand. Underscore "u" and overscore "n" when there is any chance of confusion. Print proper names and unusual words.

9. When pages are inserted use letters. For example, between pages 3 and 4 number the inserted pages 3A, 3B, and so forth.

10. A circle drawn around an abbreviation indicates that the word is to be spelled out in print. A circle around spelled-out words indicates that they are to be abbreviated. This device, however, should not be used unless the writing is in long-hand and the time is short. If the meaning of the abbreviation is not at once evident, do not use it. *Co.* may be read either *company* or *county*.

11. When there is any chance that a word intentionally misspelled (as in dialect) will be changed by the printer, write "follow copy" in the margin.

12. To cross out a letter, or in other words, to

elide a letter, draw an oblique line through it from left to right. Cross out the letter unmistakably.

13. An oblique line drawn through a capital letter from left to right makes it a small (lower case) letter. But do not obscure the letter. Remember that the printer must read it. Three straight lines under a letter or word indicate that full capitals are desired. Two lines call for small capitals, and one line for italics.

14. Always watch names. Verify every name unless you are absolutely certain of its correctness.

15. Miscellaneous points to be observed are these: uniformity should be observed in matters of capitalization, spelling, and punctuation *throughout* the copy. Paragraphing should be indicated in the copy by a deep indention or by a paragraph mark (¶), and should not be left to the compositor. Punctuation should not be left until after proof has been received. The copy should be carefully punctuated.

Printing

N Usually before the copy is set up in type there has to be some kind of understanding or arrangement with the printer in regard to such matters as cost, time of delivery, mechanical make-up or style of the work, and so on. Such matters are considered under the title of printing.

1 * The private secretary who has much printing work to look after will find that a wise policy to adopt is to select carefully a printer from whom he can expect (1) good work, (2) fulfilled promises in respect to the time of delivery, (3) expert help or service in the matter of preparing the lay-out or make-up of the matter, and (4) a fair price. Of these four considerations, the first is the most important. Poor printing is an abomination. No matter how good is the content of the article or report, poor printing will make it appear at a disadvantage.

2 ' At the same time it is important in many cases that the printed matter be delivered on a certain date. If the secretary cannot rely upon the promises of the printer in regard to time of delivery, he will soon find that he is in trouble. Printers, as a general class, are notorious for their breaking of promises to deliver completed printed matter. In many cases, this fault is the fault of those who are having the printing done, because of their delay in correcting and returning proof. The second quality, therefore, that the secretary should look for in a good printer is reliability in regard to his promises.

3 ' The third point to be considered concerning the printer is service. Many large printing houses have service departments, the purpose of which is to aid

customers in planning and laying out their printing. Such service from the printer himself or from the service department will be of aid to the secretary in deciding such a matter as the making of the lay-out of the printed matter. At the same time printers are not infallible and cannot be expected to take a keen interest in each piece of work. In case of doubt in regard to the looks of the "dummy" (the sample form or specimen of the size and appearance of the real publication that is made up to show how the printed matter will look), the secretary should rely on his own judgment. As a rule, the printer or the expert in the service department of the printer will show samples of paper, type arrangement, and sizes and styles of type. From these samples, there can be chosen, with the advice of the printer, the paper, arrangement, and type.

The mechanical make-up or lay-out will usually be in a conventional form based on custom or usage. The selection of the lay-out is governed by these considerations: (1) utility; (2) custom or conventionality; (3) originality; (4) harmony or beauty. The main characteristic which governs the selection of paper is that of appropriateness for the printed matter. Type selection is based on legibility, appropriateness, and beauty. For detailed information on this topic the secretary is referred to vari-

ous books on printing which may be found in the libraries.

The fourth and last point to be considered by the secretary is price. As there are no standardized rates for printing, each individual printer makes his own charges. The secretary should remember, though, that cheap printing never pays. For small pieces of printing it is well to take the price given by the secretary's regular printer. For large pieces of printing it is wiser to get bids from various printers, but to give preference to the regular printer in case his price is the same as those of the competing bidders or even a little higher. The reason for this course of action is that the regular printer knows the style of make-up that is wanted. Moreover, the private secretary can rely on him for good work and for his promises. This course is better than giving the work to an untried printer just because his price happens to be a little lower.

Proof reading

2. Proof reading is the art or business of correcting the printed "proofs" of articles, books, or other pieces of printing set up in type before publication. Reading, correcting, and revising of proof are duties which the private secretary is often called upon to perform even though he may have nothing to do with the editing of the "copy" or

with making arrangements with the printer. Notwithstanding the fact that the catching of typographical errors or errors of the printer can be done by a clerical assistant, it is better that proof reading should not be intrusted to assistants. This advice is given because in many instances ideas when set up in print seem to convey a meaning or impression different from that given when in typewritten form. If the secretary reads the proof sent from the printer, he will in many instances see the necessity of making certain changes — matters which would not be touched by the assistant who would not know or who would not have the skill and authority to revise.

Proof reading, including correction and revision, is much more difficult and trying than it is thought to be by the novice. The learning of the printer's marks, called "proof-marks," used in correcting proof is the easiest part of the work. Good proof reading demands the following: (1) a knowledge of the printer's marks used in correcting proof; (2) the power to concentrate so that every letter, word, and punctuation mark will be examined as a single unit and also in its relation to the whole sentence; (3) a knowledge of "make-up," the printer's term for the choice and arrangement of type, rules for paging, and so on; (4) a first-class knowledge of grammar, spelling, and rhetoric; and (5) a good,

general knowledge of the subject set up in type.

The importance of good proof reading is testified to by Charles Dickens, who said: "I know from some slight practical experience what the duties of correctors of the press are, and how these duties are usually discharged. And I can testify, and do testify here, that they are not mechanical — that they are not mere matters of manipulation and routine; but that they require from those who perform them much natural intelligence, much super-added cultivation, considerable readiness of reference, quickness of resource, and excellent memory, and a clear understanding. And I must gratefully acknowledge that I have never gone through the sheets of any book I have written without having had presented to me by the corrector of the press something I had overlooked — some slight inconsistency into which I had fallen — some little lapse I had made — in short, without having set down in black and white some unquestionable indication that I had been closely followed in my work by a patient and trained mind, and not merely by a skilful eye."

The influence of good proof reading upon the character of the composition or general printing is too often underrated. No perfection of paper, English, or binding can atone for bad or slipshod typography.

—The route through which proof goes is somewhat

as follows: After the compositor or type-setter has set the “copy,” either by hand or by a type-setting machine, the first proof of the composed types is “pulled.” This proof is called “office proof,” and is corrected by the proof reader of the printing house from the original copy. Any corrections indicated on this proof are made by the printer at his own expense. In some cases two other first proofs are “pulled” upon which are copied the corrections that have been made on the first proof which the proof readers have read. One copy of the first proof is kept by the printer and the other two copies, together with the manuscript, are sent to the author. The secretary should see to it that at least two sets of proof are given to him. In other cases the corrections as indicated in the first proof are made in the type standing in the galleys; then several proofs called “author’s proofs” are pulled. Two of these author’s proofs are sent together with the manuscript to the author. The author makes whatever corrections or changes he desires on both proofs. He keeps one proof for himself as a record and sends the other proof with manuscript to the printer.

The early proofs are “pulled” from type set up in galleys (a galley is a long, narrow tray made of brass or zinc with flanges on three sides to support the type which is placed in a frame after the copy

has been set up). If the amount of copy is small, galley proof is seldom given.

If the author makes many changes in the "author's proof" he receives a third or revised proof again taken from the galleys of type. Later these galleys of type are broken up into pages to receive headings and page numbers. Proof is "pulled" from these new divisions and sent with the last revised proof to the author as "page proof."

Reading proof

The secretary will receive the proof together with the manuscript. He should place the proof sheets on his desk and directly in front of him. The manuscript should be placed in a handy position at the left. The secretary then compares the matter on the proof sheet with that in the manuscript. He should possess a quick eye and be alert to catch every little error or mechanical imperfection in the type. He should scrutinize closely every letter of every word, clause, and sentence, while keeping at the same time a grasp of the sense of the matter he is dealing with.

The secretary in reading the proof should exercise utmost care. Letters are likely to be inverted. The spacing may be wrong. Words may have been left out or misspelled or transposed. The wrong style of type or the wrong size of type may

have been used. All such inaccuracies occur and are likely to evade the reader unless he is extremely careful.

Corrections are preferably made in ink rather than in pencil. If the proof has been printed in black ink, a different color of ink should be used in marking corrections so that the contrasting color will show the compositor in an instant the exact change that is to be made. If the proof contains the corrections that have already been made by the printing house's proof reader, the secretary should make his corrections *or changes* in an ink of a different color. For example, if the printing house's proof reader has used green ink for correction, the secretary might use red ink. This device will, in some cases, save the secretary from being charged for author's corrections brought about by mistakes of the compositor.

Typographical errors in the proof are first indicated usually by a line drawn through the incorrect letter or word, by a check mark, or by other devices. The correction is then made on the blank margin opposite the line in which the error was found. If there are several errors in the same line, corrections are placed opposite that line in exactly the same order in which the errors appear. These corrections are generally separated from each other by oblique lines. Only when necessary for clear-

ness should long lines connect the error with the correction in the margin. The frequent use of such lines tends to confuse the compositor when he is correcting the errors and slows down his work.

When several errors have been found in the same line the corrections of these various errors are made in the margin nearer the error which it is intended to correct. These corrections, however, must always be made in exactly the same order in which the mistakes occur in the type. Sometimes many errors occur in one word. In such an event it is wiser to rewrite the word in the margin than to correct each individual error.

If a large amount of new matter is to be inserted, it should be written on another piece of paper and pasted to the proof sheet with definite directions as to where it is to be inserted. If the new matter is only a line or two, it may be written on the margin of the proof sheet.

It is a wise practice to read over the proof a second time. Usually by this process several other typographical errors are uncovered. Sometimes the proof reader employed by the printing establishment will question a certain statement, fact, sentence construction, word use, and so on — used by the author. This question, called a “query,” is indicated by a question mark (?) or by the abbreviations *Qy.* and *Qu.* The query is the means by

Report
OF THE

larger type
caps
x

TREASURER OF YALE UNIVERSITY

center
↓

ital. To the President and Fellows

I have the honor to submit herewith my report as
A/ Treasurer of Yale University for the fiscal year ending
A/ June 30, 1915, during which total gifts and be-
ed. quests to both income and principal actually re-
3/ ceived by the University have amounted to \$965,791.51.

no# It is to be noted that this total, of over eighty tr
3/4. per cent. (or \$801,791.47) represents gross addi- #
:/ tions to Funds that, deducting charges against after
3/4 = / Building Improvement, Loan and other nonperma- =/
l.c./net ment Funds there is a increase for the year in En-
dowment Funds of \$768,015.71; and that, in spite of
of the fact that gifts to Income aggregated \$164,000.04, University General Account shows a deficit
of \$5,628.06, which has been charged to Contingency w.f.
stat/c/ Reserve Fund.

For purposes of comparison recapitulation 9/w.f./
[of the figures above given for the year is appended #
[together with the corresponding items for 1913-14:

□ Of the \$106,839.29 originally set apart to constitute this Con-
3/ tingency Reserve Fund there remains, as of June 30, 1915, a
3/ balance of \$86,296.43 available for use in future emergencies
and as a present protection against University Advances to In-
come Accounts, Equipment, etc. as listed in the statements of
the Funds and Assets of the University. According to the
vote of the Corporation it is to be restored to its original
figures as rapidly as circumstances will permit.

Out: see copy

A PAGE THAT HAS BEEN PROOF-READ

REPORT

OF THE

TREASURER OF YALE UNIVERSITY

To the President and Fellows.

I have the honor to submit herewith my report as Treasurer of Yale University for the fiscal year ending June 30, 1915, during which total gifts and bequests to both income and principal actually received by the University have amounted to \$965,791.51. It is to be noted that of this total, over eighty per cent. (or \$801,791.47) represents gross additions to Funds; that after deducting charges against Building Improvement, Loan and other non-permanent funds there is a net increase for the year in Endowment Funds of \$768,015.71; and that, in spite of the fact that gifts to Income aggregated \$164,000.04, University General Account shows a deficit of \$5,628.06, which has been charged to Contingency Reserve Fund.*

For purposes of comparison a recapitulation of the figures above given for the year is appended together with the corresponding items for 1913-14:

* Of the \$106,839.29 originally set apart to constitute this Contingency Reserve Fund there remains, as of June 30, 1915, a balance of \$86,296.43 available for use in future emergencies and as a present protection against "University Advances to Income Accounts, Equipment, etc.," as listed in the statements of the Funds and Assets of the University. According to the vote of the Corporation when establishing the Contingency Reserve Fund, it is to be restored to its original figures as rapidly as circumstances will permit.

AFTER THE CORRECTIONS HAVE BEEN MADE

PROOF MARKS

Mark
in
margin

Mark
in
text

1. KINDS OF LETTERS

<i>rom</i>	—	One horizontal line under a word or a letter means change italic to roman.
<i>ital</i>	—	One horizontal line under a word or a letter means change roman to italic.
<i>s. caps</i> or <i>sm. c</i>	==	Two horizontal lines under a word or a letter means print in small capitals (<i>s. caps, sm. c.</i>)
<i>caps</i>	≡	Three horizontal lines under a word or a letter means print in capitals (<i>caps</i>).
<i>l.c.</i>	/	(l.c.= lower case) Use small (common) letters.
<i>w.f.</i>	/	(w.f.= wrong font). Directs attention to a letter of a wrong size or style.

2. CHANGE OF MATTER

<i>Wrong</i>	/	(dele) Take out.
<i>stet</i>	Let types remain as set; change marked was wrong. A line of dots is placed under the change.

3. CHANGE OR INSERT LETTER OR PUNCTUATION MARK

<i>k/</i>	^	Indicates an insertion.
<i>house/</i>	^	Insert the letter <i>k</i> .
<i>=/</i>	^	Insert the word <i>house</i> .
⊙	^	Insert a hyphen.
∩	^	Insert a period.
	^	Insert a comma.
	✓	Insert superior characters, such as the apostrophe, quotation marks, etc.
✓	✓	Insert an apostrophe.

MARKS USED IN CORRECTING PROOF

PROOF MARKS

Mark
in
margin

Mark
in
text

tr.

To transpose words, the words should be enclosed and a line drawn from them to the place where they are to be inserted; if the order of successive words is to be changed, the words should be numbered.

Examples. We only ³ ² ¹ made one report.

true and straight

tr.

To transpose one line or several lines, the matter to be transferred should all be enclosed and a line drawn from it to the place where it is to be inserted.

7. IMPERFECT TYPE OF CROOKED LINES

Broken or bruised type.

Depress space or lead that shows in print.

Straighten type in words.

Straighten crooked lines.

8. PARAGRAPHS

New paragraph.

Continué in the same paragraph. The line unites the two portions of the text.

9. NEW MATTER

Out: see copy ^

Compare with copy. Words are omitted.

10. MISCELLANEOUS

Used to call attention to a supposed error in the statement of a fact, to a question of construction, etc.

Set in middle of line or page.

Carry forward to next line.

Qu. } —
Q. } —
Center [or]
overrun [

MARKS USED IN CORRECTING PROOF

PROOF MARKS

Mark in margin	Mark in text	
	✓	Insert double quotation marks.
	✓	Insert single quotation marks.
	^	Insert dash one em in length.
	^	Insert dash two ems in length.
	—	Place rule under word or words indicated.
	~	Print (æ, ñ, ð, etc.) as a ligature.

4. POSITION

		Indent; or, put in an em-quad space.
		Bring word or words farther to the left.
		Bring word or words farther to the right.
		Bring letters or words up.
		Bring letters or words down.
		Reverse an inverted letter.
		Straighten the lateral margin.

5. SPACING

#	^	More space between words or letters.
◊	◊	Less space between letters.
✓	✓	Less space between words.
lead on ld.	>	More space between lines (insert a lead).
on ld.	>	Less space between lines (take out a lead).
eq. #	✓ or >	Equalize spacing.

6. TRANSPOSITION

tr. To transpose letters, the letters should be indicated in the proof and *tr.* should be written in the margin.
Examples: be~~ve~~, ma~~st~~

MARKS USED IN CORRECTING PROOF

which the proof reader calls to the attention of the secretary his views on the matter. If the secretary wishes the matter to stand as it is, he needs only to draw a line through the query. If he sees that he has made a mistake in his "copy," he will now make the change. Queries, however, should never be left standing in the margin. They should either be crossed out or attended to; but they should not be erased.

After the secretary has assured himself that there are no further corrections or changes to be made, he should O. K. the proof by writing "*O. K. with corrections*"; then he should draw a line under that expression and place his initials underneath. If no corrections or changes were made, he should write "*O. K.*," draw a line, and place his initials underneath.

Proof reading of page proof

After the secretary has seen the preliminary proof and has made his corrections and changes, the type matter in the galleys is broken up by the compositor into pages. Page numbers, page headings, and other details are attended to. Then page proof is "pulled" and submitted to the author, together with the last revised galley proof.

Upon receipt of the page proof, the secretary should compare it with the first proof which he has

been keeping as a record. He should learn whether or not the corrections have been made just as he had indicated, without allowing other errors to creep in on the same line. It sometimes happens that the compositor will correct the correction that is indicated, but will make another mistake in that line.

After this comparison, the secretary should next take the page proof and read it very carefully. This reading should be done just as if the secretary had not read the matter before. It sometimes happens that the compositor has "pied" the type, that is, he may have dropped the galley or page of type and then may have reset the type matter without saying anything about it.

In making up page proof, the printer may find that he needs a line of matter or a word or two to fill out a page, according to paging rules. He will ask the author to furnish the matter. The secretary should comply with this request. He should count the number of letters, including the spaces, that there are in a line or that are needed, and should see that the supply of material will fit the space. Sometimes the secretary will be asked to take out some matter so that the paging may be good. Here again he must exercise his judgment. If a word or words are canceled by the secretary in revising the page proof, he should see that the space left by

the cancelation of words is filled with other words or that it is taken care of in some other way. If this were not done, it might mean that two or three pages would have to be reset.

CHAPTER XI

APPOINTMENTS, DIARIES, AND ACCOUNTS

MAKING APPOINTMENTS

Secretary should have charge of appointments

THE office of the professional man or the private office of the important business man cannot be run to the best advantage unless the secretary has full charge of the making of appointments for his chief. If the latter has to be questioned every time some one wants an appointment, he will be given much trouble. Then, too, he may not always be at hand so that the secretary can ask him about an appointment. If the system of making appointments is not very definite — that is, if sometimes the chief makes an appointment without consulting his secretary and the secretary makes an appointment without consulting his chief — conflicts in regard to appointments are going to arise. Far better is it for the employer to have a secretary upon whose judgment he can rely, and to whom he can intrust the whole business of making and keeping a record of appointments. Only by the adoption of such a method will the best results be obtained.

Good management of appointments

The ability to manage appointments to the best advantage involves two main considerations: (1) a general knowledge of the business and personal affairs and wishes of the employer; and (2) accuracy, or system. The secretary will at first find himself puzzled about who should be given appointments. Moreover, he will have to gain the ability to judge how much time should be allowed for the duration of the appointment. Both of these difficulties can be solved by experience alone. As in the case of managing callers and deciding who should be allowed to see the chief (Chapter II), the secretary must understand enough about his employer's business and personal affairs to know whether the matter or person is of sufficient importance to take up the chief's time.

The chief's time and wishes must also be taken into consideration. He may have on hand for immediate solution a difficult professional, financial, or other problem to which he must devote for the present nearly his entire time and on which he must concentrate his whole mind. He has not the time for any appointment that the secretary may make unless the appointment is of utmost importance, nor should he be interrupted frequently and forced to take his mind from the matters on which he is trying to concentrate.

These conditions should be understood by the secretary. On such occasions appointments should be made for days when the chief is likely not to be so busy; and, perhaps, appointments coming due should, if possible, be shifted to a time more convenient for the chief.

The time that the chief will need to give to each appointment must also be judged and kept in mind. If the chief has an appointment at 10:30 to discuss an important matter which will probably take at least an hour, the secretary in making an appointment for the vacancy next to that appointment should not set it for eleven o'clock and then have the caller wait from one half to three quarters of an hour. If the employer's morning is filled with the exception of the interval from 10:45 to 11:00, the secretary should not set for 10:45 a conference on some important matter which ought to be given an hour. After a little practice the secretary will be able to gauge nearly the exact amount of time that the interview will consume. Nor should he set an appointment for one o'clock, the time at which the chief usually goes out for his luncheon. If the secretary has made an appointment for the chief himself to be at a certain office a mile or so from his own office from 2:15 to 3 o'clock, he ought not to make another appointment for the chief to be in his own private office at 3 o'clock and expect

the chief to be there. All such situations must be kept in mind and foreseen.

The shifting and canceling of appointments

Under this same topic of the knowledge the secretary should have of the business and personal affairs of his employer and his wishes should be considered the judgment and tact the secretary must exercise in shifting appointments to make a vacancy in order to give more time to some emergency that arises. A safe rule to follow in the shifting of appointments is that an appointment is a promise and as such it should be kept under all, except most urgent, conditions, unless the permission of the person who has the appointment is secured to change it. Serious and disagreeable results will follow if appointments are broken at will. Indeed, the secretary should strive to prevent his employer from breaking an engagement. It is better for the secretary to incur the displeasure of his chief for the time being, so long as he gets him to keep the appointment. An appointment that is made must be honored. That is business.

Before an appointment is shifted, then, the secretary should gain the consent of the other person. To get this consent, much tact is needed. The secretary might telephone or telegraph, if a quick decision must be reached, to the effect that the secre-

tary would consider it a kindness on the part of the person who has the appointment if he would consent to make a change in the hour or date set for the appointment. At the same time out of regard for the obligation that has thus been incurred, the hour and date of the substitute appointment should be arranged to suit the other person. In case immediate action need not be secured a letter may be sent (see page 77).

Accuracy in recording appointments

The second of the two considerations involved in good management of appointments is accuracy in keeping a record of appointments. Accuracy involves a system of some kind which is understood and consistently followed. A sample system is described below.

Two separate and similar records should be kept, one for the chief and one for the secretary. These records are usually kept in the form of a book called the "Appointment Book." A new leaf in the appointment book is used for each day. At the top of each leaf stands the name and date of the day. Below, the page is ruled. As soon as an appointment is made, it is *immediately* entered in both appointment books. The record of an appointment *at the office* consists of the time, the name of the caller, and his business with the chief. The record for the

9:15		12:45	Luncheon at Hotel <i>Mr. Ford Mr. King Mr. Stuart</i>
9:30		1:00	_____
9:45		1:15	_____
10:00	<i>Mr. Fowler - ^{cancel} contract?</i>	1:30	_____
10:15	<i>Call Frank for appointment</i>	1:45	_____
10:30	<i>Mr. R. W. Pratt - ^{get} conference</i>	2:00	<i>Mr. George Cable - advertising</i>
10:45	" "	2:15	<i>Appointment for Mr. White?</i>
11:00	<i>Departmental meeting</i>	2:30	<i>Engagement at Liberty National ^{Mr. Evans}</i>
11:15	" "	2:45	
11:30	" "	3:00	
11:45	<i>Mr. M. O. Proctor</i>	3:15	
12:00	<i>Mr. George Cable - advertising</i>	3:30	
12:15	<i>Mr. Pogue - personal</i>	3:45	
12:30	<i>Mr. A. R. Bacon</i>	4:00	

PAGE OF ENGAGEMENT PAD

CASH ACCOUNT—APRIL 1916			
Date		Received	Paid
	Balance from March	28 73	
4	Mileage book		20 —
5	Check for deposit	2 00	
7	100 2ct stamps		2 —
	2 Theatre tickets		5 —
8	Telegram		45 —
	Messenger		30 —
10	Charities Guild		15 —
	1 M letter heads		18 —
	1 M envelopes		9 —
11	Trip to Philadelphia		28 25
12	Telegram		1 30
	Taxi cab		2 15
13	Entertainment Mr. C.		12 —
14	Messengers		80 —
16	Trip to Hastings		6 50
	Flowers		5 —
17	Luncheon, Mr. B & M		4 75
	Carried forward	228 73	130 50

PAGE OF CASH ACCOUNT BOOK

chief *outside of the office* contains such information as the time of the appointment, place to which he is to go, name of person he is to see, and the business. If the secretary thinks that the chief does not know the best way to get to the place of appointment, he might put in directions. The illustration on page 249 shows a sample leaf taken from an engagement pad.

If an appointment is canceled or shifted, the matter should be immediately taken care of. If the original appointment is shifted to a definite time, the secretary should write over the first appointment the time set for the substitute appointment or indicate the change in other ways.

Whenever the chief leaves the office to attend to several appointments which take him elsewhere, he will usually take his appointment book with him, so that he may keep a close record of the various times of appointments. If he is asked to make an appointment while he is outside of his private office, he will telephone to his secretary to find out when an appointment can be given, or he may ask the person desiring the appointment to telephone to the secretary in order to find out the hour that the secretary could set for the convenience of both.

The secretary should look after the preparation which is needed before the chief is ready to handle various appointments outside his private office. He

should see that before the chief leaves he has everything that he will need. It may be that he ought to have various letters, papers, and other memoranda. The secretary should understand as much as possible about the coming appointment so that he may be prepared to help his chief.

Requests for appointments by telephone

If some one calls up the secretary on the telephone and asks for an appointment with the chief and the "some one" is not known to the secretary, an appointment should not be made immediately. The caller should be put off for the time being and should be investigated.

DIARIES

Use of the diary

A diary is usually a book which records day by day things which have been done or are to be done. It is a memory, primarily for the secretary. In the office of the busy man, the secretary will find that the diary plays an important part. Although some secretaries keep records of appointments in the diary together with the other data which ordinarily go into diaries, yet this plan is usually not the best practice. If such a system is used, however, the appointments for the day should be kept separate on one side of the page and the diary entries on the

- other. For the sake of clearness and quickness in reference, appointment and diary entries should not be interspersed on the same page. If they are so interspersed, confusion will arise in looking up either appointments or things to be done.

X The diary has three purposes: (1) it is used as a book of record or reference in regard to acts of past days; (2) it is used to remind the secretary of or suggest to him things to be done on the present day; and (3) it is used as a reminder of future acts — acts which will automatically be called to the attention of the secretary or the reader on the proper day.

As a book of record of the acts of past days, the diary is important. The secretary or the employer may want to know the exact date on which a certain thing was done, or if a certain thing was done on a certain date. If either the chief or the secretary were to rely on his memory alone, he would be likely to fail, but with the diary as a memory both are saved the worry of remembering and the chance of being wrong. Suppose, for instance, that the question arises as to whether or not the employer was in Buffalo, N. Y., on January 18, 1915. It is now January 3, 1916. Surely without a diary to refresh his memory, neither the secretary nor the chief can answer with any assurance of being correct.

- ✓ President's report should go to printer
 (N. R. Howe Co., 124 West 47th St.)
- ✓ Option on 15 West Main St. Expires at 12 M.
 (Cooper and French, Agents)
- ✓ Send out notices of meeting of directors
 of Meadowbrook Golf Club. To be held at
 15 Wall St., Room 516, Sept. 30.
- ✓ Make report on present condition of
 negotiations with the M. & R. Co.

PAGE OF DIARY

ADDRESSES	
NAME.	Andrews, H. F.
STREET, No.	36 Waverly Place
CITY.	New York
TELEPHONE No.	Spring 9461
NAME.	Apperson, George R.
STREET, No.	Hotel Vanderbilt
CITY.	New York
TELEPHONE No.	Vanderbilt 7100
NAME.	Artley, J. Maxine
STREET, No.	13 Fifth Avenue
CITY.	New York
TELEPHONE No.	
NAME.	Barrows & Smith
STREET, No.	18 Wall St.
CITY.	New York
TELEPHONE No.	Broad 841
NAME.	
STREET, No.	
CITY.	
TELEPHONE No.	

PAGE OF ADDRESS BOOK

As a reminder of things to be done on the present day, the diary is valuable. Important or urgent matters which must not be overlooked are automatically brought to the attention of the secretary or the chief and can then be attended to. This automatic reminding assures both the secretary and the chief that no important matter is being overlooked on that day. It may be that the day is August 15, which is the last day upon which municipal taxes can be paid without the 10 per cent. penalty. The fact had been entered in the diary by the secretary several weeks before with the intention that it should prevent him from overlooking the payment. After he had entered the fact, he forgot it. Now it is brought to his attention, and he informs the chief of it.

In the last place, the diary is used as a memory to bring to mind on the proper day the act that must be done at that time. Since the diary is used as a memory, the secretary after entering the desired fact in the correct place can then dismiss it from his own mind with the assurance that it will come up for his attention at the right time. Such a record saves much worry for the secretary. For an example of the use of the diary to bring to the mind an act to be done in the future, let it be assumed that to-day, August 15, the employer tells the secretary that he has secured an option until twelve

o'clock noon, September 15, on the land at the corner of South and Fulton streets. The secretary should then enter the date on the page headed September 15, 1915, as follows: "Option on land at corner of South and Fulton streets expires at twelve o'clock noon. Agents for property, S. M. Goodman & Company."

In cases where it will take some time to do the act entered, it is wise not only to enter it on the date upon which it is to be brought up for attention, but also to enter it a week or so in advance. An instance of this would be the preparation of a report which is to be submitted by the employer, as president of a certain corporation. This report is due on September 15. It would be entered in the diary on that page dated September 15, as: "Last day for semi-annual report of President of Jones Steel Company." Then another entry should be made in the diary under the date of September 8, as follows: "Semi-annual report of President of Jones Steel Company due September 15."

Instructions in regard to entries in the diary are frequently given by the employer, but usually only casually and haphazardly. As soon as possible, the secretary should relieve his own memory by jotting them down in the diary on the proper page. In fact, anything that he himself thinks ought to be called up for his own or his employer's

attention should be jotted down as soon as possible after it has occurred to him.

The diary should be kept always in one place — usually on the secretary's desk — easy of access both to the employer and to the secretary. Although entries are usually made by the secretary, some employers will jot down in the diary things which they wish the secretary to do or which they desire the secretary to call to their attention. The secretary, however, has the responsibility of reminding the employer of the entry.

Perpetual journals

Besides the appointment book and the diary, the secretary will sometimes have need for a book of record called the Perpetual Journal. The Perpetual Journal is a diary book with the date, as, January 3, at the top of the page. *The number of the year, however, is not included in the date.* The purpose of the Perpetual Journal is to keep a record of transactions, engagements, or things that come up year in and year out to be done on a certain day. Suppose, for instance, that interest on a mortgage is to be paid on the first of January and July. The secretary should turn to the January 1 page in his Perpetual Journal and enter this fact:

“Pay semi-annual interest — mortgage on premises 28 Pitman Street.”

Then, he should turn to the page headed July 1 and enter the same fact. Year in and year out then, these two pages would come to the attention of the secretary, on the right day during the life of the mortgage. When the mortgage is paid, both facts entered under January 1 and July 1 should be canceled.

Or again, if Johnson and Anderson have the lease for one year on the premises at 415 Frazier Avenue and if this lease is usually renewed by them each year on June 1, this fact should be entered on the page headed June 1. Each year, then, will the fact be brought to the attention of the secretary so that the new lease for the ensuing year may be drawn up and signed or arrangements made for a new tenant.

Book of information

Another book which will be found of value to the secretary is a book in which bits of valuable information are kept. Such a book may have the various items arranged in alphabetical order. It may contain the names and addresses of the directors of the corporations in which the employer may be interested, the facts and figures about past transactions, and other points of record with which the secretary does not care to burden his memory.

This book of information may also contain a rec-

ord of the life, accident, and fire insurance policies carried by the employer, for it is commonly a duty of the secretary to look after such matters.

It is necessary to keep a record of life and accident insurance policies in order to see that the premiums are paid on time, that the policies do not lapse unless desired, and so forth. This record should contain the number of the policy, the name of the insuring company, the amount, the kind of policy, the amount of premium, the date when the premium is due, the date when the policy expires, the beneficiary, and the name of the agent who sold the policy.

It is necessary to keep a record of fire insurance policies so that they may be renewed, so that premiums may be paid on time, so that new policies on buildings are taken out after alterations have been made which increase the value of the building, so that new policies may be secured to cover new contents of buildings and houses, and so forth.

A record should likewise be kept of burglar insurance, automobile insurance, and other types of insurance in order that they may be attended to properly. This record should be kept in spite of the fact that the employer has an insurance broker to look after his insurance affairs, for it serves as a check and a handy source of useful information.

Such matters should be attended to by the sec-

retary whenever he has any leisure time, so that he may keep them well in hand and prevent any oversights in regard to them. He should remember and attend to these little items whether or not his chief remembers and attends to them.

Records of investments might also be left to the attention and care of the secretary. If stocks are held, the dividends will probably be paid once, twice, or four times during the year. A systematic list of stock certificates should be made out and should contain the name of the company in which the stock is held, the number of the certificate, the number of shares, the usual dividend rate, the date on which dividends are paid, the date of the stockholders' meetings, and so forth. The records of the bonds should contain the name of the bond, the number, the amount, the rate of interest, interest dates, the financial agents, and so forth.

There are two common kinds of bonds: coupon bonds and registered bonds. The coupon bonds are bonds which have interest coupons attached to them. These coupons are cut off on the dates upon which interest falls due and are presented through the employer's bank for payment; or they are sometimes sent direct to the financial agents of the company which has issued the bonds. The secretary should see that the coupons are sent on the proper dates. The registered bonds are bonds upon which

the interest may have to be collected at a certain place, usually the place of business of the financial agents of the concern which has issued the bonds, and on a certain date.

Mortgages need careful attention, for although some may have special interest notes, much like the coupons on a bond, which should be presented for payment at the time when they fall due, yet most mortgages have no such special interest notes and a demand must be made for the payment of the interest at the proper time and place. In the case of mortgages and notes it is usually wise to give notice some time in advance so that the persons who are to pay may be reminded that the payment is to fall due shortly and may prepare to meet it.

Such matters as taxes and club dues are likewise commonly taken charge of by the secretary.

ACCOUNTS

A knowledge of bookkeeping, even though it be of the simplest kind, is useful to the secretary. The amount of knowledge of bookkeeping that is necessary for the particular position varies with the position. The position may be such that the secretary is called upon to spend most of his time in managing the financial affairs of his employer. In such a case, he would of necessity be obliged to have a rather complete and thorough knowledge of ac-

counting. Such a position is, however, the exception. Ordinarily a knowledge of the rudiments of single and double entry will be sufficient, for few employers make a comprehensive knowledge of bookkeeping a requirement which their secretaries must have. Nevertheless, such knowledge will come in handy if the secretary takes charge of the employer's bank book or check book, or keeps a record of his own expenses incurred in behalf of the employer.

In order to provide the secretary with money with which to pay the small bills he incurs in following out his instructions, the employer will commonly open a checking account at his bank in the name of the secretary. Although the chief may not ask the secretary for an accounting of the money checked out, yet the secretary is acting wisely if he will keep an exact account of the amounts disbursed and the cause of the disbursements. Everything that can should be paid for by check. This method in itself will give a close record of payments. An accounting should be made to the employer every month. The illustration that is given on page 249 shows a sample record of personal expenses.

Private Ledger

Another piece of special bookkeeping work which the secretary may be called upon to perform

is that of keeping a Private Ledger. If all the accounts pertaining to the employer's business are kept in the main ledger there is nothing to prevent the one keeping the books from knowing everything about the business. He could tell at a glance just how much capital each partner contributed (if the business is a partnership), the drawings of each partner, the amount paid for certain lands and buildings, and many other facts of a confidential nature. The members of the firm, or the head of the firm, may wish to keep such information regarding these transactions from others, but if the books are kept in the old manner (i. e., one main ledger containing all accounts), they cannot do so. The desired result may be accomplished, though, by means of what is called a Private Ledger, which is kept in the hands of the private secretary. •

An explanation of the workings of the Private Ledger is as follows:

A new ledger is opened by the secretary. This ledger is kept in the private safe; the regular book-keeper has nothing to do with it. All accounts which the owners of the business wish to keep confidential and from the knowledge of the book-keeper are now taken out of the main ledger and placed in the Private Ledger. If, after these accounts were removed from the main ledger, nothing else were done, the main ledger would not balance.

In order to make it balance, an account is opened up (in the main ledger). *This account takes the place of all the accounts removed to the Private Ledger.*

Suppose, for example, that only three accounts were so removed to the Private Ledger. These accounts and their balance are as follows:

JOHN DOE (Partner)		RICHARD ROE (Partner)	
Dr.	Cr.	Dr.	Cr.
	\$5000.		\$5000.
LAND			
Dr.	Cr.		
\$3000.			

In order to make the main ledger balance, an account (designated as the Private Ledger Account) would in this particular case be *credited* with the *difference* of the three accounts so removed, or \$7000.

Suppose that, after the above accounts have been opened in the Private Ledger, a purchase is made of a certain piece of land for \$2000. Naturally the transaction would be passed through the cash book. Cash would be credited for \$2000 and another account would have to be debited. Ordinarily, if the Private Ledger were not in use, the account debited would be "Land Account." The bookkeeper would

then be familiar with the transaction, for he would know that the land had cost \$2000. But when the Private Ledger has been installed, instead of "Land Account" being debited through the cash book, "Private Ledger Account" would be debited. Thus would the regular bookkeeper be prevented from knowing the facts about the expenditure of the \$2000. After the account, "Private Ledger Account," has been debited in the main ledger, an entry is made in the Private Ledger by the secretary who would debit "Land Account" for \$2000.

The balance of the one account, called "Private Ledger Account," in the main ledger should equal the balance of the detailed accounts in the Private Ledger.

CHAPTER XII

ETHICS AND AMENITIES

The secretary holds a position of great trust

THE position which the private secretary holds is such a place of trust that he needs to be extremely careful in any actions which may affect his chief's interests. To the secretary are intrusted the secrets and confidences of the employer. To the secretary, as the holder of this trust, will come many questions that involve an interpretation of his moral obligations to his chief — the ethics of the relations between employer and private secretary. So nice are many of these questions that the secretary not only must be continually alive to see that he does not unconsciously betray the trust, but he must keep his conscience sensitive indeed, if he is to do the right thing each time.

The secretary must realize that his position is one of high trust and confidence; that it demands loyalty and trustworthiness. One broken confidence, one betrayal of trust, done consciously or unconsciously, and the private secretary's value to

his chief is gone — his reputation, also. Two things, then, should the private secretary always bear in mind: first that he may at any time, since he is the custodian of his employer's business secrets, unconsciously give out information that will injure his chief; and second, that if he does not keep his conscience keenly sensitive he may consciously do or say a thing which will be injurious to his employer's best interest.

Innocent betrayal of confidences

It is nearly as bad for a secretary to be an innocent party in injuring his employer's interests as it is for him to be a wilful accomplice — the effect is about the same for the employer in a business sense. Employers wish to be sure not only that their secretaries will not wilfully give away any secrets or confidences, but also that they will be alert enough not to allow themselves to be "pumped." As the secretary is known to possess the real "inside" information of his employer's business, he is accordingly made an object of the designs of cunning fellow employees, a subject of questionings by his friends (?), and a butt of plans of scheming outsiders — all of whom seek to tap the secretary's knowledge of his employer's plans, so that they can make use of it for their own financial gain. The methods used to secure the desired information are

so insidious, that without being aware of it the secretary sometimes "leaks." The wisest plan to follow is never to talk about the employer's business — or as the president of one of New York's great department stores said, "A secretary should keep his eyes and ears open, but his mouth shut."

The secretary at the very beginning should let it be known first for all time that he simply will not discuss confidential matters with any one. This stand is more difficult to take than it appears, for it means that just at the time that he is trying to make friends of those around him in the office, he must refuse point blank to "talk." Even his real friends, odd as it may seem, will want to know what is going on in the private office. These questioners must be turned down. But the reward is sure. The secretary gains the respect of those whose questions he has refused to answer, and afterwards he is seldom annoyed in this way. The man who gives in at the beginning, even in regard to unimportant information, is a marked man. He is known to be "easy," and, as a result, he is pestered with questions. Nor is that all. The employer is usually watchful at the beginning, for before he is ready to give his full confidence to his secretary he will probably test him in some way. If he is found wanting in discretion, he is discharged.

Unless of absolute necessity, note-taking of un-

usually delicate matters should be avoided, for it is not at all improbable that such memoranda may get into the hands of persons who could make good use of them. Notes taken on confidential business should be carefully guarded, and the secretary should hold himself responsible for their security from the eyes of outsiders.

How to meet questions

It will be of aid to the secretary to know how to meet the questions of those who are trying to secure information from him. A statement guardedly made can be easily colored and twisted into misinformation by the listener. The latter may also believe that what the secretary says has a hidden meaning. Many secretaries in answer to questions about their employers' business or affairs say, "I do not know." This method has been found to be a better way than a harsh and sometimes embarrassing reply, "I can't (or, won't) answer that question." Besides, such an answer will lead to continued efforts by the questioner: "Why can't you answer it? I won't say anything," and so forth. Evasive answers are seldom satisfactory. Although the secretary has certain information and although he realizes that his questioner knows that he has the information, it is common practice for him to say that he does not know.

Suppose, for example, that the private secretary to an important financial man is approached with the question, "What is the Interborough going to do about the coming dividend?" This question may be put to him skilfully and tactfully and it will probably come upon him suddenly. The questioner may conceal its intent and bring it up as if it were a casual matter. But let the secretary be careful. Even though it is a friend (!) who has asked the question, yet, if this information leaked out, it would probably be used against the employer. It is common practice for the secretary to say he does not know about it and then turn the conversation into other channels as smoothly as possible.

Small bribes

The secretary is in a position to do various little favors for others, such as trying to influence the mind of the employer to a certain action, arranging interviews, calling the attention of the employer to a certain matter, and so on. Since he does hold such power in his hands, he is sometimes approached by those who desire to curry favor with him in order that he may use his influence with the employer in their behalf. In order to get the secretary favorably inclined toward their requests, they send in such minor bribes as cigars, theater tickets, and so on. Although the wisest plan to follow is

to refuse such bribes when they are recognized as such and not as rewards for his kind or good offices in the past, yet in many cases the refusal of such things may seem boorish; in other cases, the return of the articles is practically impossible.

The secretary should remember that he is employed by his employer to protect him against just such people, and it would certainly be a betrayal of trust to accept these small bribes to do that which the secretary would not otherwise do. If the secretary will bear in mind the fact that these small gifts are usually given in order to get him to do something for the giver, he will understand the situation. The acceptance of such things renders more difficult than would otherwise be the case the refusal of requests made by the givers. The secretary should avoid accepting the gifts, if he can. But if he finds that it is impossible under the conditions to refuse the small gift or to send it back, he should keep it with the idea fully known that it is not in any way to influence him to favorable action for the giver.

Questions of conscious use of information

A difficult and perplexing question arises with the secretary when he knows a bit of financial information which he can make use of for his own financial betterment. He may have gained the in-

formation by overhearing the conversation of the employer with some one, or he himself may have transcribed it in the form of a confidential letter. With this information in his hands, he is sometimes sorely tempted to use it, for he argues that since he himself is not divulging any information he cannot harm the employer. Such an assumption, however, is wrong. The private secretary has access to this valuable information only through the confidence placed in him by his employer. He should not take advantage of this confidence to better himself. Moreover, the actions of the private secretary to important men are carefully watched by those who wish to learn what these men are doing. For example, if the private secretary to a big financial man on Wall Street were to go into a brokerage office and while there were to buy or sell a certain stock, his action would soon be known by others who would be watching him. These others would know that he is likely to have "inside" information and that he himself is making use of it. They themselves would then follow his example and the result would be that the private secretary has given away by his action the plans of his chief.

More stories are heard of private secretaries going wrong in using information for their own benefit than are heard of private secretaries going wrong in any other way. Such matters, if they ever come

to the ears of the chief, and they usually do in time, mean that the secretary will lose his position and his reputation. Confidence once lost is seldom regained.

Whenever the employer wants the secretary to make some money he will say, perhaps, "We are getting up a syndicate to handle —. If you want to take a share in it, just let me know." Such is the way that an employer will reward a man in whom at last he has placed his confidence.

The secretary should remember that confidence is a fundamental upon which the relations between private secretary and employer are based. Destroy the confidence and the private secretary loses his value to the employer. In case of doubt, be too conscientious rather than not enough so.

? AMENITIES FOR THE POSITION

One of the characteristics of a good private secretary is the possession of a practical knowledge of the amenities necessary for his position. The secretary should make himself agreeable and pleasant in disposition, actions, and manners to his employer and others into whose company he is thrown. He should know and practise the requirements of convention or custom in regard to social and business intercourse.

Dress

The matter of dress should be considered first because it is usually the first thing that makes an impression. By his dress is the secretary usually judged first. If he has freakish ideas about dress, he will soon find that he is laboring under a disadvantage. Correct dress for all occasions is the first requirement.

Slovenly, careless attire is a great handicap. Old, ill-fitting clothes and flashy or sporty dress are offensive to good taste. The best way to dress is in such conformity with convention that the dress arouses no unfavorable comment. The clothes of the secretary should not be such that they force themselves into the attention of others; his clothes should not make him conspicuous but should be noticed only for their good taste.

Besides the effect of correct dress on the minds of others, the knowledge that he is clothed according to the best custom has an effect on the mind of the wearer. As he knows that his dress will not be an object of criticism, he is not afraid to go among important people. This knowledge gives him confidence in himself, for not only does he perceive the consideration his dress secures from others, but also he knows that he is correctly dressed. Emerson wrote, "The consciousness of being well-dressed brings a satisfaction which even

religion cannot bestow." On the same subject Hazlitt said, "Everything almost depends upon first impressions; and these depend (besides person, which is not in our power) upon two things, *dress* and address, which every one may command with proper attention."

Manners

It is largely by the manners of the secretary that the feelings of the people around him are determined — and feeling has as large a part in business as reason has. If the secretary has pleasant, agreeable, and correct manners he will usually make a good impression on the people he meets. The casual caller or new acquaintance is predisposed in favor of the secretary if he finds the secretary well-mannered and pleasant. The old maxim is, "Desire to please and you will infallibly please."

An easy, graceful, confident address certainly is an asset in managing callers and in appearing among people. The secretary should know how to handle himself, how to meet people, and how to talk to them. Hazlitt made the following wise observation: "I would not have you, from not knowing how to enter a room properly, stumble at the very threshold in the good grace of those on whom it is possible the fate of your future life may depend. Nothing creates a greater prejudice against any one than

awkwardness. A person who is confused in manner and gesture seems to have done something wrong, or as if he was conscious of no one qualification to build a confidence in himself upon. On the other hand, openness, freedom, self-possession, set others at ease with you by showing that you are on good terms with yourself. Grace in women gains the affections sooner, and secures them longer, than anything else — it is an outward and visible sign of an inward harmony of soul — as the want of it in men, as if the mind and body equally hitched in difficulties and were distracted with doubts, is the greatest impediment in the career of gallantry and road to the female heart.”

The secretary should be well informed on etiquette. He should have this information so that he will embarrass neither himself nor his employer by his ignorance of social customs and conventions. The story is told of a bright young man who was being considered by the head of a concern for the place of private secretary. This young man came highly recommended as to ability and character. The business man, since it was near luncheon time, invited him to take luncheon with him at his club. The young man accepted and both went to the club. As soon as they were seated at the table, the young man proceeded to tuck his napkin around his collar. He ate so rapidly that he finished long before

his host. Then he leaned back in his chair and began to pick his teeth. All this while the prospective employer had been quietly observing his manner. Such was his disgust that he could hardly restrain himself.

The young man, although he had ability and a good character, was not given the slightest consideration for the position after the prospective employer had seen the manner in which he acted. The business man could not afford to have such a man represent him.

Any good book on etiquette will help. But best of all the secretary, who desires to perfect his knowledge of social or business conventions, should observe the actions of those who know.

CHAPTER XIII

SYSTEMATIZING THE OFFICE

Efficiency and system

THE routine work performed in the private office is under the supervision of the secretary. The secretary, therefore, is responsible for efficiency in the office. The work of the office is done efficiently if it is done in the easiest way, in the quickest time, and with the *best results*. To that end the secretary must have a definite system of some kind.

System, as applied by the secretary, is no more nor less than a set of definite rules which govern routine actions. As far as possible definite rules should be laid down as to who is to do certain work, as to how certain work is to be done, and as to the order in which the different pieces of work are to be taken up. These rules must be definitely understood and must be unfailingly adhered to by the secretary and the office assistants. The consistent adherence to the rules will bring about the habit of doing things in a certain way and in a certain order. Such a habit conserves mental and physical labor.

The secretary should devise systems for the three

main divisions of the work performed in the office. These three divisions are: the general office work of the office assistants, the work of the employer, and the work of the secretary himself.

Systematizing the general office routine.

The secretary is responsible to the employer for all the little details of the office. If the employer calls for a certain letter and the secretary is unable to find it in the files because of a mistake made by the office assistant in filing it, the employer is likely to hold the secretary responsible. If the employer discovers that the letters he is signing are not typewritten in correct form, he is likely to place the blame on the secretary — and justly. He feels that the secretary ought to take from his shoulders the responsibility of such matters as training the office assistants to file correctly and to typewrite letters in correct form.

It is wholly in accord with the theory of the position of secretary, therefore, that the secretary superintend all the various details in connection with the general office routine performed by office assistants. Suggestions as to improvements and changes may come from the employer. Usually, however, the employer will leave such matters to the secretary because of the pressure of work. At the same time the secretary will find that he, too,

is unable to give all his time to directing the routine actions of the office assistants. The best he can do is to lay down rules for them to follow in doing their work.

If each office assistant knows definitely just what he is to do and just how he is to do it, the work of the office will be effectively carried on with but little recourse to the secretary for instructions. The secretary will thus relieve himself of the necessity of much personal supervision. His system for the office should call for as little personal supervision as possible, in order that he may have time for more important work. The system should be so rigid that the chances for blunders are few; but yet so flexible that the office assistants have an opportunity to show their initiative in devising better ways of doing things.

Ready-made systems that apply to certain types of office work are not available, and, if they were, they would not be so efficient as those devised by the secretary for the peculiar needs of his office. The secretary should make up and have typed out, therefore, a set of rules to be followed by each office assistant. For example, the set of rules to be used by the stenographers would include rules on the typing of letters. These rules would describe definitely the mechanical make-up of the different forms of letters used; moreover, samples

would be given. Hence, if the secretary in dictating a letter tells the stenographer that the official form of letter is to be used, the stenographer can later turn to the rule on official letters and find that in official letters the inside address is to be placed in the lower left-hand corner just below the body of the letter, that the date is to be spelled out in full, that the special double letter sheet is to be used, and so forth.

The office assistant who does the filing should have a set of rules for his work. These rules can be made up by the secretary from his greater knowledge of filing. Even the office boy should be given definite instructions in his work.

Systematizing the work of the employer

Although the secretary has no authority to force his system on his employer, yet by means of tactful suggestion he can remedy many faults in the employer's method of doing things. If the employer is continually putting off action on important matters, if he allows letters to go unanswered, if he is wasting his time on unproductive routine and unimportant work, the secretary should get him to change his system. This he can usually do by first planning the system for his employer and then getting him to adopt it unconsciously.

The secretary should direct his energies first of

all to the employer's desk. A disorderly desk, itself a result of lack of system, breeds more lack of system. If important letters, unfinished work, blotters, memoranda, and so forth are indiscriminately thrown together on the working surface of the employer's desk, and fill the drawers of the desk to overflowing, then the secretary's work is plainly cut out for him. If the secretary is ever to help his employer to get his work done, he must dispose of this mass which turns the top of the desk into a cemetery. After the top of the desk is cleaned up, it must be kept clean, for the sight of the clean desk stimulates the user to keep it clean — and that means getting work done.

But the secretary should be careful in the disposing of the papers on the employer's desk. Permission should first be secured in a tactful manner to sort out the papers. From this sorting the secretary will be able to learn what papers can be filed, what papers should be given immediate attention, and so on.

The secretary can sort all the material on the top of the desk into the following four divisions:

- 1 — Unfinished matter, such as the day's letters, routine plans for the day, and so forth.
- 2 — The matters pending, such as letters and papers that cannot be answered to-day, but must be held for several days.

- 3 — Completed matters that can be filed now as they have been attended to.
- 4 — Desk tools, such as blotters, stationery, and so on.

The first division can be further subdivided into three divisions as follows:

- A — Matters which must be taken up immediately, such as important telegrams, letters, memoranda, and so forth.
- B — Matters which can be taken up later in the day; but which must be done to-day.
- C — Matters which do not demand attention to-day, but should be done if time permits.

The material in subdivisions A and B of main division 1 can be taken care of by means of a temporary portfolio, which the secretary can make for himself. He can take four or five open end manila filing folders and fasten them together with a string or with brass staples. On the tabs of these folders he can write such titles as will suit the peculiarities of the work. The following titles are suggestive:

“Letters Ready for Dictation.”

“Matters for Immediate Attention.”

“Take up with Andrews.”

This portfolio, marked “Work for the Day,” should be kept on the working surface of the desk at the left-hand side.

The material in subdivision C of main division 1 should be put into a folder marked "Unfinished Work." This folder should then be placed in the upper right-hand drawer of the desk where it can be readily referred to after the material in "Work for the Day" portfolio has been disposed of.

Material sorted into main division 2 is composed of matters pending; i. e., letters or papers which cannot be finally disposed of because of lack of facts or other information, necessity for further study, and so on. This material should be put into a folder marked "Matters Pending." The folder should then be placed in the upper right-hand drawer of the desk.

Material in main division 3 is made up of letters, papers, and data of all kinds, that have had attention or need no further attention. This material should be filed or passed on to some one else.

The material in main division 4 is made up of that clutter of office tools, such as pens, pencils, blotters, elastic bands, stationery, and so forth. These articles are of little use unless they can be found in their right places when they are wanted. Stationery should be placed in the middle left-hand drawer of the desk. One or two pens and a pencil should be kept in the pen tray on the working surface of the desk. The rest should be placed in the top middle drawer of the desk. The ruler,

blotter, and shears should be placed in the same drawer. A receptacle for rubber bands and clips should be kept there also where these articles will be handy. The working surface of the desk should be kept clear of all tools, except those in constant use.

After the secretary has cleared up the desk of the employer, he should see to it that the system is adhered to. He should straighten out matters every day until the employer himself gets into the habit of being more orderly.

The secretary still further develops a system for his employer by consistently planning out his time, by seeing that he keeps his appointments, by suggesting that a certain piece of work ought to be done, and so on. It is the secretary's duty to keep after his employer so that he does his work, but there is, of course, great need for tact and diplomacy in getting the employer to adopt a system.

The secretary's daily routine

As has been stated elsewhere in this book, the secretary is hired to take from the employer's shoulders as much detail work as possible. To perform this detail work, and yet to have time to help his employer on creative work, the secretary finds that he needs a good system. He needs to plan his own day's work so well that at the end of the day

he can honestly say, "I have satisfactorily disposed of everything that needed to be disposed of to-day, and yet I have been able to do some creative work." The secretary can best handle the multiplicity of his affairs by devising a system and adhering to it.

The first step is to lay out a plan for the day's routine. This plan goes into effect every day, even before the secretary arrives at the office. Before arriving at the office in the morning the secretary should carefully read the morning papers. He should read the general news for general information. Any point of particular interest to the employer or his business should be clipped or otherwise noted. The editorials should be read for the mature comments on the important topics of the day. After arriving at the office the secretary should first consult his "tickler," desk calendar, diary, or follow-up file. Any one of these four may remind him to get a certain piece of work under way immediately. Even a delay of half an hour might easily mean serious trouble later. He can also plan the day's work.

Next he should open and digest the morning's mail (see page 62). The third step is to consult the appointment book and get in mind the appointments for that day. The fourth step is to start on the unfinished work of yesterday that demands ac-

tion to-day. The fifth step is to take up new work. After the third step, the secretary will be frequently interrupted to answer the telephone, to meet callers, and to perform other like routine matters of the day.

There should be no pausing or dawdling after one piece of work is done. The secretary must keep everlastingly at it. If he is able to finish his routine work, he should start on new plans and ideas that would help his employer. He can consult his diary and start work on matters which are not due for some time.

Certain rules will be of aid in bettering the secretary's system. The first is as follows: The secretary should never put off for an instant the execution of current business or the carrying out of a wish or even a thought of his employer. This rule is a great conservator of time, and, if strictly followed, tends to form an invaluable habit which will keep the secretary's slate clean. It will allow the secretary to take up and dispose of new business or an emergency. Besides, it will give him an opportunity for original thinking and consequent development. Once the secretary takes up a piece of work he should see it through to completion. Concentration is needed.

The second rule is: Always know where certain papers are and how to get them instantly.

The third rule is: Don't promise until you are sure.

The fourth rule is: When you make your promise, make a note of it.

The fifth rule is: If you are forced to break a promise, or an appointment, notify the other man.

The sixth rule is: Do not forget anything.

Although the secretary may be capable of remembering the many details attached to the performance of his duties, yet the constant worry and strain brought about by the attempt to keep all details in the mind will soon bring bad results. If his brain is cluttered with details, the secretary will never be more than a "routine man." The secretary should remember that his brain has only a certain capacity and that it should not be overloaded with details. The big ideas should be carried in his head; the details in his pocket. Some system should be devised by the secretary to take care of the details.

The secretary has several methods of taking care of the details, for he has an appointment book ¹ to keep track of the appointments; he has his perpetual journal ² to keep him in touch with matters which must be attended to year after year; he has a desk calendar pad which will constantly keep before him the list of things still to be done; he has a

¹ See page 248.

² See page 256.

diary¹ which is a record of the past, present, and future events. And he needs most of these mechanical devices if he is to go home at night with the assurance that all the details of that day have been attended to, and with the unburdened brain of the man who has been wise enough to plan and use a system to take charge of details.

Another device that will be of aid to the secretary is the "tickler." This device is an adaptation of the card index and the chronological system of filing. Its main advantage over the diary or desk calendar consists in the fact that notations for work which must be put off to-day need not be rewritten, but merely transferred. Another advantage is that original documents such as business cards, slips of paper with notations on them, etc., can be kept until the right time.

The equipment consists of a set of partition cards with tabs which bear numbers from 1-31; 12 month cards, each with the name of a month on its tab; and a container, usually a box. (The cards are often kept in position by the partition boards in the upper left-hand drawer of the desk.)

A record of a matter to be attended to in the future is written on a slip of paper and dropped behind the card of the date on which it should be

¹ See page 251.

brought up for attention. On each morning the secretary will take out the slips in the compartment behind the card bearing the date of the same morning and will thus see the affairs he must attend to on that day. If he finds then that any affair needs to be postponed, the same slip of paper with any added notations can be put back of the proper date card for attention on that date. This system acts as an effective follow-up.

The secretary's desk

It is unnecessary to describe minutely the system that the secretary should have in regard to his own desk, for it would be but a repetition of the description of the system applied to the employer's desk. It is not a waste of space, however, to advise the secretary again to keep the working surface of his desk clear of all but the material he is working on and the tools he is working with. The influence that a cleared desk has on the user of the desk is great. The sight of a clear working surface is a constant stimulus to get the work out, and to keep the top of the desk free from piles of papers and affairs that have been disposed of. "Keep the desk clear" is a motto of value.

Besides keeping the working surface of the desk cleared for action, the secretary should see to it that the drawers of the desk are being used in ac-

cordance with a definite system. The first big rule that the secretary should follow in regard to the desk drawers is system. The basic law of this system is, "The right place for the right thing." The secretary should not keep the working surface of the desk cleared at the expense of the desk drawers. He should not shove the papers on his desk haphazardly into the drawers. Each drawer should be the receptacle of certain papers only. In this way it is possible for the secretary to find, later, the paper he wants.

A suggestive system for the use of the desk drawers is the following: The upper left-hand drawer might contain those books which are in constant use, such as the diary, the perpetual journal, the book of information; the front part of the drawer might hold a 3" x 5" "tickler." The middle left-hand drawer might contain letterheads, envelopes, and memorandum pads.

The bottom left-hand drawer might contain unfinished work for the future, such as reports and plans, to which the secretary might turn after he has finished the pressing work of the day.

The top drawer in the middle of the desk might contain in front, in proper receptacles, pins, clips, rubber bands, pencils, pens, and so forth; in back could be kept a large account book. The upper right-hand drawer should be used to hold the folder

marked "Unfinished Work" and "Matters Pending" described on page 283.

The bottom right-hand drawer is usually a deep drawer. This drawer can be made excellent use of to hold folders of different affairs to which the secretary has constant recourse. Or it can hold a follow-up file. (Description of such a file is given on page 288.)

APPENDIX

NECESSARY CHARACTERISTICS OF THE PRIVATE SECRETARY

Requisites for the position

It is well to point out that not every one is fitted to be a private secretary. A knowledge of general business and of the specific business of the employer, of the specific duties of the private secretary, and the possession of the ability to perform such duties, do not alone make one suitable for the place. The position of private secretary is peculiar. It demands that knowledge and ability be present, *together with certain moral, mental, personal, and physical qualities*. The private secretary cannot be one-sided. He must have both requisites. The possession of the moral and mental qualities is the *sine qua non*, the essential element. If he has the knowledge and ability, but lacks the latter qualifications, he cannot be a real private secretary.

It must always be remembered that the relationship between employer and secretary is likely to be

intimate and personal. This relationship cannot exist unless the private secretary has the right moral and personal qualifications. Again, he who has these qualifications can usually acquire the knowledge and ability that are also demanded, but the man who has not the moral qualifications is usually unable to acquire them. The whole structure of a private secretary's usefulness, therefore, rests upon his possession of certain moral and personal qualifications.

The moral qualities which are essential to the private secretary for the performance of his duties are:

1. Trustworthiness
2. Self-abnegation or unselfishness

Added to these moral qualities he should have the following mental qualities:

1. Initiative
2. Tact
3. Good reasoning power
4. Quickness and alertness of mind; adroitness
5. Retentiveness of mind
6. Concentration
7. Foresight
8. Skill

Together with moral and mental qualities, certain physical and personal qualities are looked for in the good private secretary, as follows:

1. Agreeable personality
2. Correct and easy speech
3. Correct personal appearance
4. Correct deportment
5. Good health

ESSENTIAL MORAL QUALITIES

Necessity of moral qualities

Moral qualities and characteristics are taken up here, not merely because they are highly desirable characteristics, but because they are the essentials that the secretary must have if he is to be of service to the employer. If the employer knows or fears that the secretary is weak in any one of the essential moral qualities given above, he will not confide in the secretary, nor will he allow him to decide on executive matters. If the secretary is not taken into the employer's confidence or if he is not permitted to use his judgment and act for the employer, his usefulness and the reason for his position are destroyed.

Trustworthiness

Of the moral characteristics that the secretary must possess, the most important is trustworthi-

ness. This is the state or quality of being worthy of trust or confidence. The employer must be able to confide his secrets to his secretary, supremely confident that the secretary will be discreet. The employer must know that his secretary can be trusted and relied upon to act always in his best interests — that he can be depended upon to perform his duties faithfully. He must be assured, moreover, that the integrity of his secretary is irreproachable and incorruptible.

Secretiveness or discreetness is one of the divisions of trustworthiness. In the case of the private secretary, it is the most important of the divisions, for we have learned that the word secretary comes from the Latin word *secretarius*, which means one intrusted with secrets. The secretary is going to be in possession of many of the important secrets of his employer and of his employer's business. Hence, it is imperative that the secretary should be one who will not divulge any of the confidences of his employer. In certain cases he will be offered bribes and in other cases he will be cajoled to divulge some of that knowledge which he has about his employer's business. The secretary must realize that when he does give any of this information he is injuring not only his employer but himself. He is injuring his employer because the information he gives will probably be taken ad-

vantage of and used against his employer. He is injuring himself because very soon will the employer find out that the cat has been let out of the bag. The result of this is that the employer will be afraid to trust his secrets to the secretary, and, when that occurs, the secretary becomes of little use to him.

The characteristic of loyalty is a second division of the main quality of trustworthiness. Loyalty is the state or quality of being loyal — being true and faithful to any person or persons to whom one owes fidelity. The secretary must have this qualification, for he is in a position of trust and is many times called upon to handle executive matters. In such cases he must always act in the best interests of his employer. He must never take advantage of his employer in any way, for that would be a breach of trust. He must act for his employer as he would act for himself.

Besides being loyal to his employer in the acts which he performs, he must also have a belief in his employer. He must take an interest in his employer's business and welfare, and must believe that his employer is usually in the right. If he has not this belief in his employer, he will not put into his work the enthusiasm which is so necessary. Moreover, he should stand up for his employer in all cases. In the case of verbal attack by enemies

or in the face of insidious remarks detrimental to the employer, he should boldly defend his chief. It is expected of him.

Truthfulness is the third division of the main quality of trustworthiness. It means telling the exact truth, the whole truth, and nothing but the truth. The employer will in many cases depend upon the secretary for information. This information must be given with no exaggeration, no shading of meaning, no mental reservation, and should represent the real state of affairs so far as it lies in the ability of the secretary to know and state them. The employer is practically forced to rely on the statements of his secretary and to back them up if they are made to outsiders. Unless he can rely upon the truthfulness of the secretary, he is at a decided disadvantage in carrying on his business.

Self-abnegation or unselfishness

The second of the two main qualities or moral characteristics which the private secretary must possess is that of self-abnegation or unselfishness. The secretary must place his employer's interests foremost. He must practise self-abnegation where the employer is concerned. As his employer should be relieved from as much work and worry as possible, the secretary must take upon his own shoul-

ders such worry. It will be remembered that the secretary is the other self of the employer. The secretary, accordingly, must submerge his own individuality and interest and be a part of the chief. This does not mean fawning humbleness. It means that the secretary should carry out the wishes of his employer — not his own wishes — and in the way the employer desires. The secretary, however, should not be without independence of character, for this quality is essential if the secretary is to criticize in a constructive sense the plans and actions of his chief. If he lacked independence in the matter of thinking or acting, he would probably be a weak secretary. A man who is unafraid to voice his own honest convictions when asked, gains the esteem of the employer. The secretary should be independent but he should not try aggressively to *force* his ways on the employer. Independence can be carried too far. The secretary should always remember that the chief is the one in command.

ESSENTIAL MENTAL QUALITIES

Initiative

The rarest mental quality, and hence the most valuable to the private secretary, is that of initiative. This is the quality which the private secretary possesses if he can do the right thing at the right time without being told, if he can start an

undertaking, and if he has the capacity for independent action. It is the power of thinking for one's self — the power of doing original work — the power of exercising one's own judgment in the performance of certain acts. As has been said above, the private secretary should do more than those things which he is told to do. If the employer constantly has to supervise what the secretary does and has to lay out in detail exactly what the secretary is to do and how he is to do it, the secretary has not much initiative, and is not very valuable. The man that is wanted is one who can be left to his own resources and can be relied upon to make and carry out plans. He is forever completing one thing and taking up something else. All this he does alone — with not a word from any one — with no need of hints or advice or encouragement or prodding. Usually nobody knows what he has been doing until he comes in to report that the thing is done and then every one realizes that it was the right thing to do, although no one else happened to think of it until that moment. He thinks up all his action for himself and carries out his plans to completion.

It is not sufficient that the secretary should attend from day to day to casual details — or some of them that turn up of themselves at his elbow and force themselves upon his attention. He must

have a perspective — a view of his work as a whole — a clear conception of the main objects that he ought to accomplish. If he has no systematic method covering all the points that offer opportunities for action profitable to his chief, if he has no schemes or plans, if he has no mind to plan and no energy to put his plans through to completion — then he has no initiative.

Initiative rests upon three things: imagination, reasoning ability, and energy of the will. The secretary should have the imagination to plan and to see what will result if his plan is put into operation; he must have a perspective of his work so that he can look ahead. Moreover, he should have the ability to reason out matters so that his plan of action will be based on good reasons. And lastly, he should have the energy of will to start the plan and push it through to the end.

Initiative, in the active sense as applied to the private secretary, depends a great deal upon the association with and the knowledge of the character of the employer. The private secretary cannot very well go ahead and exercise his own initiative or judgment unless he first knows what the employer would like done in certain instances. Here, again, it is seen that the private secretary is the *alter ego* — the other self — of his employer. He must pretty nearly know just what the ideas of the

employer are on the question in hand and just how that employer, if he were there or if he were called upon to decide himself, would decide certain questions. The secretary must strive to find the way the employer's mind works, the lines which he follows in thinking out his decision, his character, and so on, so that the secretary may decide and plan just as the employer would. This knowledge of the employer's method of doing things must be secured before the private secretary can feel safe and confident in exercising his own initiative. The secretary should act, but he must act according to reason.

Initiative is a very necessary part of a private secretary's equipment. It is capable of culture; it can be cultivated just as muscular force can be cultivated. Accordingly, it is the duty of the private secretary to give it opportunity to grow. Muscles are usually developed by exercise. Initiative can be developed by a systematic course of training and by continually thinking up new ideas. Successful effort very soon inspires a confidence which is confirmed and increased by repetition. The executive qualities should be developed by persistently carrying out everything that may come within the reach of the secretary's duties.

Initiative is too often considered to be like genius — a gift which cannot be cultivated — a gift which

is born in its possessor. No doubt some have more initiative than others, but that is no reason why the less gifted should despair of the development of that which they really possess to some degree. Some men have stronger muscles than others, but they have secured them usually through development. Every bright idea that comes to the secretary's mind should be transformed to action when the right time comes. If the secretary is deeply interested in his work, that interest will soon spur his initiatory powers. He will study the methods of other successful secretaries and adopt them bodily when he is himself unable to improve upon them. He will continually try to pick up better methods if he can. Then suddenly before the secretary realizes it he has the initiatory habit strongly fastened to him. After he has done that, he has made one of the longest strides toward success that it is possible for him to make.

Men are likely to lack initiative, not because they lack the courage to make a decision, but because they do not possess the judgment which is necessary to decide matters correctly. If they have made one bad mistake and have been severely censured for it, they very rarely try to exercise their judgment next time. They lose confidence in themselves and in their judgment of matters. Judgment and experience are the foundations upon

which initiative rests. Hence men who find themselves weak in initiative should strive to secure the experience and reasoning power which will enable them to decide and plan correctly. They should learn to reason carefully.

Women are likely to lack initiative because they are by nature of a rather timid disposition. They are afraid to make a decision, for they fear that it may not be the right one. Women usually have the necessary judgment and the taste in matters which would come under their jurisdiction, but they fear to assume the responsibility that such a decision would bring upon them. Women private secretaries, if they overcome their natural timidity, will be found to possess initiatory powers.

Tact

Next in importance to the quality of initiative is that of tact. Tact is a quality closely akin to that of initiative, for it is the ready power of appreciating and doing that which is required by circumstances. It is the sense of doing the correct thing. Such qualities as courtesy, politeness, diplomacy, polish, smoothness, and patience are included in it. It involves psychology—the study of the workings of the human mind.

Two very important duties of the private secretary are the meeting of callers and the handling of

correspondence. In the successful performance of these two duties tact plays an important part. Callers must be received courteously and treated politely, no matter what their position in life may be. In the handling of the many puzzling matters brought up in correspondence, tact is required. If the secretary has tact he will be able to extricate himself and his employer from many difficult places without antagonizing or offending the other persons concerned. We must live with other people and hence we must adjust ourselves to them if this living is to be agreeable. Tact can be said to be the consideration of the sensibilities and feelings of others.

Reasoning power

In certain circumstances matters calling for decision are brought to the attention of the secretary. To decide correctly it is necessary that he have good reasoning power, that is, the power of reasoning out for himself from the facts that he has at his disposal and from his past experience, what should be done in this particular case. Again, the secretary will be called upon and should be prepared to help the employer in solving some definite problems in his business. In order to give the aid that is asked of him, it is necessary that he should have some power in reasoning. Moreover, as has been

said above, the ability to reason out a plan of action is one of the three components of the valuable quality of initiative. The power of reasoning is usually developed through education and study.

Quickness, alertness, and adroitness

The three characteristics of quickness, alertness, and adroitness should be considered together, for they are very much alike. Quickness is the power to act quickly, to decide quickly. Alertness combines the meaning of quickness with that of watchfulness. Adroitness is the special readiness in devising means to meet difficulties, to extricate one's self from puzzling circumstances, to avoid danger.

There are so many situations that demand quickness in action and in decision that the qualification of quickness is of importance. The secretary must be able to decide quickly his course of action in handling callers. He must be able to take in a situation at a glance. He must be quick in grasping the significance of things at once, for if he were not quick many little ideas and actions would never be perceived by him.

In handling the telephone, too, the quality of quickness is of value. The secretary must be able to make up his mind on the instant whether or not the caller can see the executive. If immediate ac-

tion is called for, quickness certainly is essential in the successful handling of the matter.

Quickness in thinking is usually born in the possessor of it. The secretary who realizes his inability to think as quickly as he would like can improve himself by various practices. He can have a friend rapidly fire all sorts of questions at him, if he desires to gain a greater facility in speech and in thinking. Or he can practise on mental arithmetic. Under such constant urging, the brain can be trained to some extent to act more quickly.

The secretary must have a facility or readiness of speech so that he can, for example, answer quickly any questions that the chief may put to him in regard to his opinion or in regard to things that have happened in the office which the executive must know immediately. The secretary should be able to give him the information quickly.

Alertness combines the quality of quickness with that of watchfulness. It means that the secretary must be watchful of the interests of his employer. He must be alert to prevent being imposed upon or taken advantage of, for big executives are usually made the object of all sorts of schemes by impostors and by the unscrupulous.

Adroitness is a characteristic of the good secretary. It means that he should be resourceful. On many occasions puzzling and embarrassing situa-

tions will arise, which the secretary will be at a total loss to handle unless he can extricate himself and possibly his employer by his own inventiveness and quick wits.

The three characteristics discussed above are usually the result of a keen mind. To keep the mind keen the secretary should look after his health and should be especially careful of the amount of sleep that he gets.

Retentiveness of mind

Retentiveness of mind is also necessary if the secretary is to have quickness, alertness, and adroitness. In making a correct decision and in handling a situation with adroitness and alertness, the secretary must be able to call up immediately what action he has taken in the past on similar occasions, what facts and what points of knowledge will be of aid in deciding this particular instance quickly, and similar information. A general experience then is of aid to the secretary in acting quickly, but experience is of little value unless it is remembered and can be recalled to the mind immediately.

The employer will expect that the secretary will remember every important thing and nearly every unimportant thing which concerns him or the office. He will rely upon the secretary to keep such matters in mind and will himself dismiss them from

his own mind. Hence, to the secretary, a photographic mind is helpful. Everything that goes on in the office must be remembered. Faces and names must be recalled on demand. What was done with a certain paper, with a certain letter, what a particular caller wanted, how a letter was answered, and so forth — these are facts which the secretary must keep in mind.

Concentration

Concentration is the ability to focus and direct all mental (or physical) energies on the thing to be done. At the same time, the word *concentration* implies the arriving at the completion or conclusion — the accomplishment. This quality is closely allied to that of quickness, for to decide quickly the secretary must be able to concentrate his mind and his reasoning faculties upon the question at hand. A man whose mind wanders and who is distracted by every interruption will never be able to accomplish much — at least he will not be able to accomplish much quickly.

Foresight

Foresight is the ability to foresee. It is provident care — the ability to look ahead and prepare for things. The secretary must always be prepared for events and situations that may arise or

are going to arise in the future. Often he is called upon to plan, and planning is nothing more than looking ahead. If the employer has decided to go to Chicago and has told the secretary that he is to leave New York at 9 o'clock on a certain day, then the secretary should exercise his foresight by providing railroad tickets, securing accommodations, looking up people whom the employer is to meet in Chicago — in all, preparing for the future. The secretary should never be taken by surprise; he should always have a course of action already mapped out to meet every possible contingency. Foresight is akin to alertness, for it is a watchfulness for the future — it is the deciding and acting in the present with an eye toward the effects in the future.

Skill

The quality of skill as applied in secretarial work is the proficiency in performing all secretarial duties. It is acquired from two things, knowledge and experience. The secretary must have the knowledge of the things which are to be done by him and how they are to be done. At the same time knowledge without experience will not give excellence of performance. Experience is needed, and in many cases experience will take the place of knowledge, for in performing a certain secretarial

duty the secretary can act automatically by following out what he has done in the past — what his experience tells him to do. The combination of knowledge and experience is the most valuable. Skill also implies dexterity — expertness in the performance of mechanical work.

PHYSICAL AND PERSONAL QUALITIES

Agreeable personality

An agreeable personality is somewhat difficult to define. It is something that we are impressed with — that makes us like the possessor — that attracts us to him. It is a magnetic power which draws us toward him. It constitutes his distinction.

People whom we like we strive to help. Hence if the secretary's personality is such that it makes a good impression upon callers and others whom the secretary will meet, the secretary will thereby be benefited, for he will get them on his side.

Cheerfulness is contagious. Anger and impatience are powerless when met with good humor. The ingratiating power of a pleasant manner cannot be overestimated. In many cases will abuse and impatience be shamed into apology because of the amiable and pleasant disposition of the secretary. Callers will leave the office with a good impression — an impression which has been made by

the personality of the secretary. The secretary should constantly try to make a good impression on his employer and on others with whom he comes in contact. An easy way to make a good impression is by an agreeable personality.

An agreeable personality can be developed, but it means practice every day until it becomes a habit. The secretary must strive to have always a pleasing manner. Good health is a factor in achieving agreeable personality, for a man who is troubled with indigestion or is not feeling well has a rather difficult task to act pleasantly to other people.

Correct and easy speech

A man is judged and gives his first impression by his manner of talking and by his personal appearance. If the secretary's speech is crude, he stands condemned. The importance of conversational powers needs no argument. Everybody acknowledges it. The secretary who is an easy and polished conversationalist or speaker is immediately marked as being well educated and cultured. In no better way can the secretary advertise himself than by his speech. As a rule, he is in constant contact with people who have received a good education. To these people defects in speech, physical and grammatical, are especially annoying. Accordingly, the

secretary should give special attention to correct speech. Not only should his speech be correct; it should be polished. This means that he must have at his command a well-stocked vocabulary and an ability to speak fluently. As a matter of fact, ease in speaking is usually secured through a command of a large number of words from which the speaker can choose quickly just the word that will express his meaning. He should not be compelled to grope and fumble for his words, nor should he stumble or hesitate over what he is saying. His speech should be natural, easy, free, and unaffected. There is no need of showing his authority and position by the use of a gruff and aggressive tone.

The secretary should adapt the tone and style of his conversation, of course, to his listener. If he is conversing with the caller who is waiting to see the employer, he should select subjects that are of interest to him. Hence he should be well supplied with general information so that he can talk on subjects of interest to the different men whom he meets. If the secretary wants the other man to listen, all he needs to do is to talk about him or his interests. Very seldom indeed should the secretary talk about himself. Easy speech, then, is aided by gaining command of a good store of words and facts. He should listen to good talkers and observe how they make their remarks.

Correct deportment

Correct deportment means the manner of deporting one's self especially with respect to the courtesies and duties of life. It means correct behavior — demeanor — bearing. Specifically, it means that the secretary should have a knowledge of the customs and usages of social and official life and should act in accordance with them. He must always observe due courtesy, respect, and etiquette. In the handling of the mail for his employer he will find many instances where he will be called upon to make use of his knowledge of the customs of social and official letter-writing. If the secretary is not very sure of himself on points of etiquette and deportment, he should read some good book on etiquette. Such a book, however, will not give to the secretary the fine touches and the experience which he can secure if he will observe others. He should then make these observations his own by practice.

Correct deportment means also the attitude that the secretary takes. Because he is in a position of trust for his employer, he should not assume a dictatorial or aggressive manner toward those who call upon his employer. "Important" men are not liked. Condescending ways are harmful. It is far better that he should be modest and unassuming although he does carry within his hands a great

deal of power through his connections with his employer.

Correct personal appearance

The expression "correct personal appearance" is here used in the colloquial sense which means the various points about a person's outward appearance that strike the eye of the caller, such as, for instance, clothing, style in wearing clothing, neatness of person, and so forth.

The secretary should know the value of good clothes. He should realize this value because he should realize the value that a first favorable impression has. A well-dressed man always demands a certain amount of respect and attention. By good clothes, however, is not meant flashy clothes. Here again the secretary must rely upon his powers of observation. He should mark well the style of dress that is in vogue and that is considered proper. It does not mean that he should be adorned with jewelry or with what are called "loud" clothes. His taste should tend more toward the conservative than toward the *ultra*.

Cleanliness and neatness of person also come under the head of personal appearance. The secretary must realize that he is under the constant surveillance not only of his employer but of the callers that come into the office. If he is careless

about his person and does not care whether he has a clean collar on or whether he needs a shave, then he can rest assured that such points are marked and are set against him. The only reason in a business way why the secretary should observe these two qualities is because they have business value for him.

In all matters of personal appearance the secretary must be his own critic — he must look in his mirror. He can be sure that no one else, with the possible exception of a very good friend, will criticize him to his face in regard to his personal appearance, but he also can feel certain that if criticism of his appearance is justified it is usually given behind his back — where it will hurt him most. The secretary in this respect must look out for himself.

Good health

Good health is spoken about here because it is a business asset for the secretary. The good secretary must be energetic; he must be wide awake. He ought to be the more active of the two — the secretary and the employer. A man who is weak in health is usually weak in energy. Unless the secretary is in good health he very seldom has this energy, and hence does not do good work. Moreover, radiant vitality has much to do with a strong

and agreeable personality. If the secretary is continually falling ill, it means that his employer has to suffer, for he then must do a large amount of the work himself.

For purely business and financial reasons, then, the secretary must look after his health. Passive care of the health — that is, avoidance of dissipation of various kinds — is good, but active care is far better. The secretary should take exercise of some sort regularly, even though it is only a setting-up exercise every morning and evening in his room. Open-air exercise, however, is best.

Let the secretary once realize that such qualities as quickness, agreeableness, tact, initiative, concentration, all depend largely on good health, and then he is likely to strive to keep his own good health. The private secretary's position means work and very steady work. Day in and day out, and usually for three hundred and sixty-five days of the year, he is called upon to help his employer. In order to stand the grind and the continual strain, the secretary must have physical endurance. With such endurance he can do better and more work for his employer. A man who is in bad health cannot devote his whole mind to his work. Good health is one of the most important of all requisites for success as a private secretary.

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